Effective Secretarial Practices

The twenty-seven chapters are arranged in a logical sequence. Part I presents an analysis of the secretarial profession and stresses the importance of personal factors—appearance, performance qualities, office relationships. It emphasizes and provides an opportunity for self-analysis, the first prerequisite to personality development. Part II deals with the handling of office mail, which is generally considered the most important single responsibility of the secretary. The next four parts cover a wide variety of specialized secretarial duties—receptionist work, communication and transportation responsibilities, sources of business information, preparation of business reports, financial and legal matters, office machines, and office organization. Part VII considers the methods of obtaining a position and earning and securing promotion.

The end-of-chapter materials consist of reference readings, questions, problems, and projects. A list of carefully selected reference readings is provided to enrich the text presentation. Questions are of two types—questions on readings and discussion questions. The problems and projects are of many kinds, but they have one purpose— to provide realistic practice in typical secretarial activities. No special forms are necessary for the completion of the problems. The projects, though, require the use of special forms and stationery. Instructions are given in the projects for the preparation of all required forms; however, a workbook correlated with the text is available. The workbook contains all forms and additional problem materials. Its use is optional.

Although primarily written as a textbook, *Effective Secretarial Practices*, Second Edition, will serve the student as an excellent reference book both during the training period and on the job. The logical arrangement of subject matter and the detailed index make it easy to locate information. Tabular summaries of information pertaining to telephone and telegraph services and postal rates are provided; and a reference section includes material on business letters, special address forms, capitalization, compound words, numbers, punctuation, word division, and abbreviations.

E. K. B.
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E. L. P.

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PART I

THE SECRETARIAL PROFESSION

CHAPTER 1

ANALYZING YOUR SECRETARIAL POTENTIALITIES

IF YOU would be an ideal secretary — that poised, charming, efficient person in a busy office who seems to know every answer, who shoulders the responsibility for details for an important executive, who holds a position of trust as the personal representative of the employer — then this book is written for you.

WHAT IS A SECRETARY? The word "secretary" comes from the Latin *secretum*, meaning *secret;* it is defined as "a confidant, one entrusted with secrets." This definition of the word suggests the characteristic of the secretary that distinguishes her most sharply from other office workers. She is the confidante of her employer and is entrusted with secrets every office day. She occupies a position of real trust and must be a person of the utmost discretion. She acts as a buffer between her employer and the public, saving him from needless interruptions and annoyances; and, like a shock absorber, she makes it possible for him to travel along his business road with fewer bumps and jolts. One famous woman in the political field said of her secretary, "Miss X makes life possible for me." Another employer said of his secretary, "Miss M is my peace of mind."

Here, then, is a field in which you can combine the stenographic skills you have learned with all of the applied psychology you know or can learn. Here is a chance to go beyond the routine position calling for mere technical ability and to become an expert in human relations. Here is an opportunity to make a career of diplomacy.

The word "secretary" is defined as follows in the *Dictionary of Occupational Titles:*

Performs general office work in relieving executives and other company officials of minor executive and clerical duties; takes dictation, transcribes; makes appointments for executive and reminds him of them. Interviews people coming into office,

directing to other workers those who do not warrant seeing the executive; answers and makes phone calls, handles personal and important mail, writing routine correspondence on own initiative. May supervise other clerical workers.

Many stenographers in small offices perform some secretarial duties, but a stenographer in the central stenographic pool of a large company spends most of her time in taking dictation and transcribing it. She is supervised, and her work is carefully planned for her. When she finishes transcribing the dictation in her notebook, her supervisor checks her work and tells her what to do next. The secretary, on the other hand, usually is expected to plan her own work, and she often helps to schedule that of her employer too. She is responsible for her own checking; one of her most valuable assets is her ability to "follow through" on jobs assigned her. Often she has working under her supervision other employees who take dictation and instructions from her.

A stenographer in the pool helps the dictator represent the company to those who correspond with it. The secretary helps her employer represent the company to callers, to those who telephone, and to those with whom she corresponds. The secretary is definitely "front office." She *is* the company to all with whom she deals.

The secretary has to be willing to suit her time to the exigencies of the situation. She may have to cancel a luncheon appointment or even a dinner engagement in order to meet some crisis arising in her employer's work. Like all positions involving responsibility, the secretary's job requires sacrifices that rank-and-file workers may not wish to make. Those who prefer to spend their lives in routine work miss much of the challenge of new contacts, ever-increasing responsibilities, and varied experiences.

The work of the secretary is, at times, fascinating and exciting. Often it is exhausting, discouraging, trying, and apparently thankless. It is always detailed and exacting, but seldom is it dull or monotonous. Each day is different. The secretary who loves such work derives happiness and satisfaction from her intimate part in the vital affairs of the business and through sharing in the successes, the interests, and the problems of the employer.

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THE COLLEGE-TRAINED SECRETARY

envelopes, stamping the letters, and mailing the letters, rather than the single complex operation of mailing letters. A reexamination of the list shows that the duties fall into relatively few categories.

In 1934 Nichols[2] attempted to isolate the duties and traits that differentiate the stenographer from the secretary. He asked secretaries to check in a list of 35 duties those which they perform most frequently. The duties listed are complex ones, such as taking dictation and handling callers; they were selected after available literature in the field had been consulted. In his study, too, the duties group themselves into comparatively few classes.

One of the most recent studies on this subject was published by the Bureau of Business Research of the University of Michigan.[3] This research reports that the most common duties of the secretaries studied are:

1. Taking dictation and transcribing.
2. Filing — in central and personal files, using folders and cards, alphabetic lists, and subject lists, and in follow-up or "tickler" files.
3. Making appointments and keeping a record of them.
4. Answering the telephone and routing callers; making local and long distance outgoing calls.
5. Reading and sorting the mail.
6. Operating an adding or calculating machine.
7. Assisting with the preparation of written reports of a general, financial, government, or research nature.
8. Making travel reservations, including transportation and hotels.
9. Composing communications from oral instructions.
10. Seeing customers and meeting the public.
11. Gathering material for reports.
12. Doing personal banking for the employer.

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[2]F. G. Nichols, *The Personal Secretary* (Cambridge: Harvard University Press, 1934).

[3]Irene Place, *The Personal Secretary, A Study of Personal Secretaries in Sixteen Communities in the State of Michigan* (Ann Arbor: Bureau of Business Research Report 12, 1946).

13. Acting as intermediary for the employer in the organization.
14. Organizing and typing reports from rough data.
15. Typing copy for publication.
16. Copying from employer's longhand notes.

From these three research studies and from others in the field the topics included in this book were chosen. The duties common to most secretarial positions fall into the following ten classifications:

1. Attending to the office mail, both incoming and outgoing.
2. Performing stenographic duties, including dictation, transcription, and typing.
3. Preparing and keeping files, records, reminders, daily calendars, clipping books, etc.
4. Using telephone and telegraph facilities.
5. Meeting and talking with people — callers, superiors, subordinates, and co-workers.
6. Assisting in travel preparations and personal work of the employer.
7. Knowing and using business reference sources.
8. Preparing business reports, writing minutes and legal forms, making statistical analyses and charts.
9. Attending to financial duties incident to banking, insurance, real estate, securities, taxes, and payrolls.
10. Purchasing office supplies and equipment, and ordering repairs to office machines.

Requisite 3: General Background. Recently a secretarial student who reported on readings of biographical material about successful secretaries was asked the question, "Which do you think contributed more to the success of the secretaries you investigated, technical training or background?" She replied, "Well, I guess that it was background; but I had never thought of it before. One of those secretaries even said that she felt that foreign language was the most valuable subject that she studied in college. I had always hated having to study French and complained because I had to take it. I

wanted to study typewriting when I was a freshman and felt that time spent in general courses was wasted. Now I have begun to have a new viewpoint."

Some students chafe under the prescription of required courses; they cannot see what possible monetary benefit there can be for them in science, history, social sciences, or psychology courses. They believe that they want only technical training, not general education. Yet, the secretary in an engineering office would be handicapped without facility in mathematics, the secretary in a publishing company can use to advantage a foundation in literature, and the secretary in marketing is helped by a background in economics. In these cases the uses to which general education is put are apparent.

General education is essential in the preparation of the secretarial student, for only when she has a wide background of interests and understandings can she develop into the well-adjusted, four-square person who can effectively represent her employer to the outside world and who can associate with and assist successful men and women in the upper levels of business and the professions. It is not really a question of *either* background *or* technical proficiency; background *and* technical skills are necessary.

Another aspect of general education is vitally important to the secretary, social education. In her position she will need the ease of manner and the poise that come from meeting people socially. One who wishes to become a secretary should provide opportunities for participation in group activities and should make conscious effort to develop socially.

Requisite 4: Apprenticeship. The future secretary usually serves an apprenticeship by working in a less responsible office position. College-trained secretaries sometimes by-pass this step or remain there for only a short time. It is always helpful, though, to have the rough edges of total inexperience smoothed away before taking on full secretarial responsibilities. It is the best way to acquire the familiarity with business routine necessary to handle secretarial work.

Taking time to get one's beginning experience in the business world seems to be one of the hardest steps in becoming a secretary because of a natural impatience to get to the top.

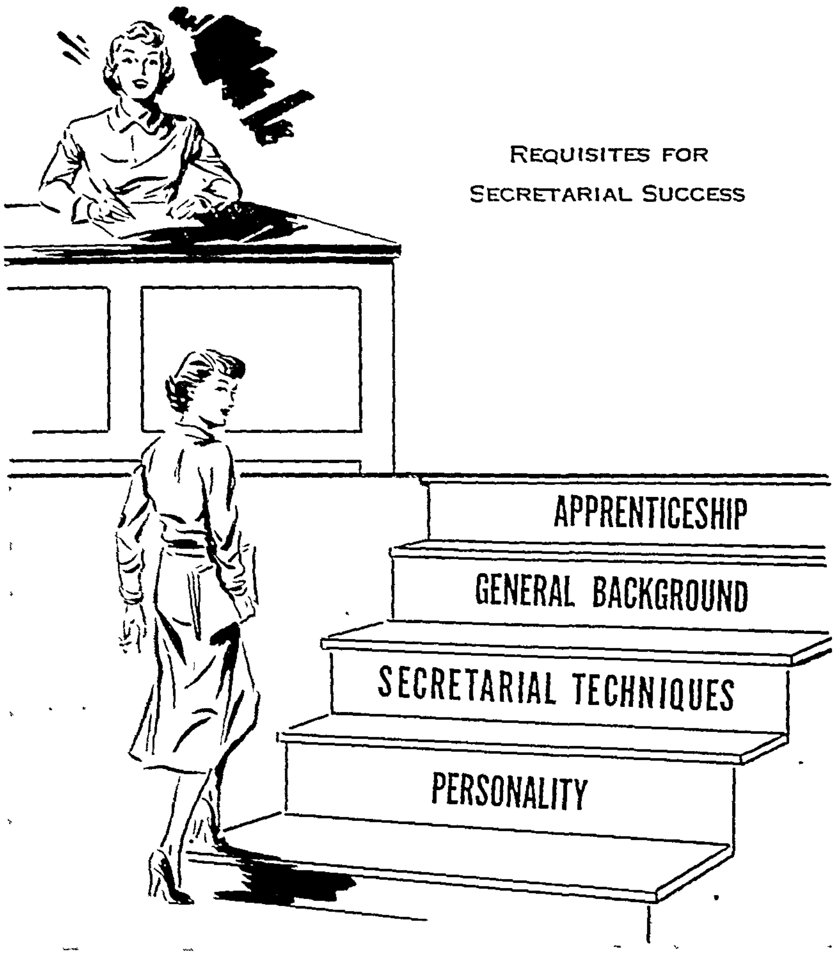
Doctors must serve as internes; skilled tradesmen must work as apprentices for several years. Secretaries usually step up through the ranks to higher levels too.

You can get started on your apprenticeship now by doing volunteer office work at the local Red Cross, the Community Chest, your church, the Y.M.C.A., the Y.W.C.A., or for campus, civic, or charity enterprises. Such volunteer work will build up your experience record, will establish references, will introduce you to business routine from the inside, and will give you an opportunity to improve your stenographic skills.

One of the best ways to get experience is to work in an office during at least one summer vacation during your college career. Your instructor will probably help you secure a position. Increasingly, colleges are realizing the value of work experience before graduation; and your school may have a co-operative office training program in which you earn college credit for supervised experience.

Summary of Requisites. The four steps, then, that must be taken by every aspiring secretarial student are: (1) personality development, based on thorough self-analysis and a carefully planned program of improvement; (2) secretarial techniques, developed after a detailed study of secretarial duties; (3) general background, built up through broad education and wide social contacts; and (4) apprenticeship, served for the purpose of becoming familiar with business routine.

SECRETARIAL OPPORTUNITIES FOR MEN A number of businesses prefer men in stenographic and secretarial positions. In the transportation field (railroads, trucking, and aviation corporations), in the oil and the rubber industries, in firms manufacturing heavy machinery and equipment, and in some government work, men are favored over women. Possibly this preference arose because of the necessity for the secretary to associate with workmen, to work outside sometimes, or to work at night. Probably present conditions do not warrant the distinction, and it must be admitted that in many cases women are preferred for secretarial positions because they do not object to the attention to the minutiae necessary in such work and they can be hired more cheaply than men.



In some positions, though, men are preferred in this field. The secretarial desk is an excellent training post for an executive position, and the secretary trained under a successful executive is good material for advancement. Because he works in close contact with the employer, his correspondence, and his records, the male secretary gains a comprehensive knowledge of an executive's responsibilities. He learns how to cope with the many problems that come up and how to interpret the policies of the company. Thus he is unusually well prepared to fill an executive's position. There is still a subtle, but

PLACE, IRENE. *The Personal Secretary — A Study of Personal Secretaries in Sixteen Communities in the State of Michigan.* Ann Arbor: Bureau of Business Research Report 12, 1946, 33 pp.

PRATT, MARGARET. *The Successful Secretary.* New York: Lothrop, Lee & Shephard Co., 1946, 144 pp.

QUESTIONS ON READINGS

1. What are the chief advantages of secretarial work?

2. What characteristics differentiate secretarial work from stenographic work? What demands are made upon a secretary which are not made upon a routine worker?

3. In what way does a secretary represent the company?

4. What are the four requisities for secretarial success? How can you acquire each requisite?

5. Of what value are studies of secretarial duties? What are the commonest duties of secretaries?

6. Why are there more women secretaries than men? For what types of positions are men preferred as secretaries? Why?

7. What evidence did you find in your reference readings which would indicate that secretarial work approaches professional status?

DISCUSSION QUESTIONS

1. Can the most frequently listed duties of secretaries be learned in school, or must they be learned on the job?

2. What courses have you taken or do you plan to take which will be of the greatest technical value to you? Of greatest general value?

3. Does the importance of personality in office work mean that a secretary with an outstanding personality can succeed despite serious deficiencies in shorthand and typewriting skills?

4. Do you think that the criticism that woman's subjectivity is a deterrent to her business advancement is a valid one?

5. Which of the different types of secretarial positions do you think you would prefer? Why?

6. What opportunities for office experience are available to you while you are taking this course?

PROBLEMS

1. Read *The Successful Secretary,* by Pratt, or three magazine articles about successful secretaries, or interview three successful secretaries. Prepare a typewritten analysis of their duties, out-

CHAPTER 2

BUILDING A SECRETARIAL PERSONALITY

PERSONALITY is personal magnetism — that which attracts others and influences them. The development of personality is of slight vocational importance to the person who works alone, but it is essential to a secretary. Her stock in trade is applied psychology, interesting and influencing the three groups of people with whom she deals — her employer, her associates, and the public with whom she comes in contact.

SELF-ANALYSIS AS A BASIS FOR DEVELOPMENT

One very successful secretary said, "I had to lose three jobs before I learned how obnoxious certain of my traits were and before I went to work to curb those tendencies." Many persons have to learn the hard way about their personality deficiencies, and you may be one of them. But studies have been made of desirable secretarial traits, and methods are being devised for helping you find out what sort of personality you have. If through self-analysis you can begin to see yourself objectively, and if you develop a plan of action for improvement and actually follow the plan, you may be able to build a personality that will better prepare you for a secretarial career. You may not have to lose three positions before you learn what business requires.

Only as you understand yourself, learn to guard against traits that weaken your personality effectiveness, and strive to develop those that strengthen it, can you attain a magnetic personality. Studying a long list of traits will be of little value to you. Unless you constantly search your own temperament, analyze your own problems as a basis for self-improvement, and carry out your plans for self-improvement resolutely, the following discussion will be of little value to you.

When 135 secretaries were asked by Place[1] to name the factors that require further development after employment,

[1]Irene Place, *The Personal Secretary—A Study of Personal Secretaries in Sixteen Communities in the State of Michigan* (Ann Arbor: Bureau of Business Research Report 12, 1946), p. 15.

encourage those employees or supervisors who are having difficulty in adjusting their personalities to the demands of the situation to use these tests. If the respondents give frank and honest answers to the questions, the resultant profiles bring into sharp relief any personality deviations that may be present. When a person has been given an insight into his weaknesses as well as his strength, he is much more able to direct his efforts toward self-improvement. He no longer goes about from day to day needlessly "rubbing people the wrong way."

One such test, which has been widely used, is the Bernreuter Personality Schedule. It measures the traits of introversion, extroversion, dominance, submission, self-sufficiency, and sociability. Several investigations conducted in business and industrial situations have been reported that show the effectiveness of this test. One investigation found that the scales differentiate between supervisors (men who had fifteen or more persons under their direction or supervision) and those of a contrasting nonsupervisory group. The supervisors made scores showing them to be less neurotic, less introverted, more dominant, and more self-confident than the nonsupervisory group.

You may wish to take the Bernreuter Personality Schedule or one or more of the half dozen other personality tests, either through the instructor in this course or through the testing bureau of your institution. This is a fascinating field of psychology that is being explored, and you will want to learn about it and to gain the benefits that are afforded through the analyses made.

If you take such a test, study the results carefully in conjunction with the rest of this chapter.

PERSONALITY TRAITS NECESSARY FOR SECRETARIAL SUCCESS Certain personality traits are necessary for success in any business position. The employer pays for and expects to get honesty, promptness, co-operativeness, industry, carefulness, courtesy, adaptability, and attractive appearance from all employees. He resents clock watching, gossiping, visiting on company time, poor work habits, carelessness, delays, impatience, discourtesy, officiousness, "griping," inability to

work harmoniously with others, and untidiness. Certainly nobody is going to be selected for promotion to the secretarial level who does not possess *in exceptional degree* those requisites for success in any business position. The secretary must develop these traits to a very high level.

Below are discussed twelve qualities that the secretary must possess in addition to the above-mentioned basic ones. Examples are given of the application of the trait in secretarial situations and then in typical college situations. It is hoped that you will ask yourself whether you have developed the desired personality trait or need to work toward that end.

Trait 1: Do You Get It Right? Accuracy is involved in every phase of secretarial work — transcription, typewriting, spelling, mathematics, keeping records, taking and reporting telephone messages. A secretary must develop an ability to get things right the first time.

During her first day on a temporary job, a vacation-relief secretary, without being told to do so, readded some columns of figures she had been given to type in order to check the correctness of the totals. She found an error of $35; and when she reported it, the employer said, "You are here to stay. If we haven't a permanent job for a girl like you, we'll make one."

> Are you developing the ability to find your own errors? Do you check and recheck your work before you submit it for grading? If you are not sure whether to spell "judgment" with or without an "e," do you take a chance on its being right and decide not to look it up in the dictionary?

A test that will help you rate yourself as an accurate or inaccurate worker is the Minnesota Clerical Ability Test, which requires only twenty minutes to take. You are asked to examine two rows of figures and two rows of names and to check those which are exactly alike. On the basis of the norms that have been established over the years among successful workers, you will be able to determine whether development of this trait needs your attention.

Trait 2: Can You Follow Directions? A secretary was told to prepare five carbon copies of a letter. After she had finished

transcribing, she noticed the instruction — too late. Fifteen minutes were lost while the letter was retyped.

An advertising manager told his secretary, among other things, to write a letter to the publishers of a certain magazine, telling them not to run his advertisement in the issue going to press. The secretary forgot to write the letter; and, as she did not check back to her instructions for the day, the item escaped her attention. Her carelessness cost the company $2,400 for an advertisement it did not want, and it cost the secretary her job.

> You as a student are told to write a letter in modified block style. You write it in indented form and then ask the instructor if, since time is at a premium, he will accept the indented letter, which is, according to you, perfect. Are you learning to follow directions?

Perhaps you do not understand the instructions; perhaps you do not write down instructions and are unable to remember each point; or perhaps you have only a hazy idea of how to carry out the directions. To avoid any of these pitfalls, observe the following step-by-step procedure for each task both today in school and later on the job:

1. WRITE *ALL* INSTRUCTIONS.
2. Ask to have doubtful points explained.
3. Ask advice, if necessary, on how to proceed.
4. Perform the task in accordance with the instructions.
5. Check and, if necessary, double-check the work for accuracy and completeness.

Trait 3: Can You Take the Next Step and Anticipate What Is Needed? After the secretary has demonstrated that she can get it right the first time and that she can follow directions, her employer is going to begin to expect her to exhibit initiative, to do the right thing at the right time without being told. For instance, he will depend upon her to assemble all papers relative to a certain transaction and to attach them to the letter so that it is ready for answering. Of course, it is necessary to know one's job thoroughly in order to recognize the things that can be done. A newcomer refrains from using initiative

until the details of the work are mastered. Initiative without full knowledge of all circumstances sometimes results in serious mistakes.

The employer will expect resourcefulness in his secretary, ability to cope with a situation without too much help from others. One secretary proved her resourcefulness in the following incident: Her employer needed certain technical data that he believed were outlined in a letter received months ago. The secretary carefully read the entire folder of correspondence and found a letter stating that the data were being held in the office of the president of the local professional society. The letterhead listed the name of the president and his business address, but not the name of his firm or his business telephone number. She then found that the telephone directory gave only the residence number. She thereupon called the man's wife and asked her for the name of his firm and his business telephone number. Then it was but a matter of moments until she was talking with the president of the organization and taking down the data in shorthand.

> Are you the kind of student who would say, "Yesterday's *New York Times* had a statistical map of the United States showing this year's increases and decreases in population by states. Since our class is making a map for such increases in 1948, I thought you would like to see the new one, so I cut it out and brought it." If so, you have initiative.

Trait 4: Do You Exercise Common Sense and Discerning Judgment? To translate common sense into actual performance means to THINK about what you are doing. The girl who transcribed a letter to a large automobile company and wrote, "We very much appreciated the brassiere," could not have had very much common sense. Even if she did not know the meaning of the word "brochure," common sense certainly should have told her that something was wrong with the word she selected.

Closely allied to common sense is good judgment. This means the ability to make decisions on the basis of careful consideration. An unhappy example of lack of judgment is the incident of a girl found counting the words in a dictated

letter in order to determine its placement on a letterhead. When the employer spoke rather sharply about it. her eyes filled with tears; and he vowed he would never again hire an inexperienced worker.

> Does everything in the letter make sense to you before you hand it in? Would you be willing to hand in a letter that says, "We must collect a fun of information"?
>
> How good is your judgment in campus affairs? Do you hastily join a faction that advocates changes which, after consideration, may not seem practicable? Do you weigh problems from all angles before you make decisions?

Trait 5: How Good Is Your Memory? A secretary needs a good memory, for she must be an information bureau when questions are asked. Memory experts give startling exhibitions of techniques by which names of a roomful of strangers can be memorized in a period of minutes. Many companies hire such demonstrators to teach their salesmen how to do this, for they know that the return to them will much more than justify the cost.

To have someone remember your name, face, or voice is flattering, and it creates goodwill. An office secretary in a very small office was given a very lucrative position by a caller who observed her unusual memory when he visited her firm. He noticed that she was able to call almost every visitor by name and that she had telephone numbers of clients and details of information on the tip of her tongue whenever the employer wanted them. This girl had deliberately set out to train her memory just because she felt that she had an abnormally poor one.

Even more important than remembering names and faces is the memory of details of your work — what you did last week, last month. A secretary saves her employer much annoyance by being able to answer the question "Do you remember — ?" He asks this question many times during a week.

> How many students and faculty members can you call by name? Do you listen for the name when you are introduced? Do you repeat it as an

aid to memory? If you develop a good memory for names and faces while you are in college, it will pay you dividends. Can you remember the procedure for writing the examination you last took in a course? the routine for holding a class meeting?

Trait 6: Can You Reduce Waste Motion? Efficiency is the ratio of work completed to the energy put forth and the time consumed. Industry has tremendously increased its profits by reducing that ratio through studies and job analyses for the purpose of eliminating time- and energy-wasting motions. Although the secretary does not work on an assembly line, she should become familiar with efficiency methods and apply them to her work for greater production.

Efficiency means economy of motion — having all supplies at hand before starting a job, doing the job methodically until the movement pattern is so set that it becomes a habit, and planning the movements so that they are as tireless as possible. In an office convenient arrangement of supplies, materials, furniture, and equipment aids in eliminating waste motions. Countless unnecessary movements are saved if file cabinets are near desks, if stationery supplies are arranged so that little handling is required, if an eraser is placed at the side of the typewriter, if copyholders are used, and if a rubber band is used to mark the place in the dictation notebook.

Are you one of those busy, busy transcribers who dash into the typewriting room, sit down at the typewriter, and then discover that you forgot to bring carbon paper, borrow some from your neighbor (interrupting her, too!), roll your assembled sheets into the machine only to discover that you have the carbon wrong side up, finally get started, make an error, reach down to the floor for your pocketbook, extricate an eraser from the conglomeration in it, make the erasure, discover that you cannot read your notes, interrupt your neighbor to ask her for a word, decide that you cannot spell it, go to the front of the room to the big dictionary because you did not think to bring your desk copy, rush back, and finish your letter five minutes later than the majority of the class? If so — and every class has some members like the one described — you need to learn to reduce waste motion.

Trait 7: How Smooth Is Your Disposition? If the secretary is constantly agreeable (not saccharinely so, but pleasantly), she will be of immeasurable value to her employer. No one can do his best work if he sees a morose or sullen face every time he raises his eyes. Each of us goes through an adolescent stage of pouting and resentment; but the secretary must outgrow this phase, for it has no place in the business world. Agreeableness pays big dividends in business, just as it does in school popularity.

Some people go through with an assigned task, but spoil the whole effect by doing it grudgingly. When you have a job to do, do it willingly and do not spoil it by a negative attitude. An employer will overlook some incompetency if a secretary maintains an attitude of being agreeable and is willing to do anything she has to do.

Even if the employer yells and swears when his temper gets the upper hand, he wants to be answered quietly and courteously by the secretary whose salary he pays. If he is a busy man — and she probably would not be there if he were not busy — he is too much wrapped up in his work to have either the time or the inclination to solve her problems or to cope with her personal idiosyncrasies. He will probably forget to say "Thank you" when she renders a service; he may regard the act as value received for compensation paid.

The secretary can easily develop a complex about not being appreciated, and she must guard against such a tendency. It is all part of the game for the employer to take the credit for the secretary's work. If she is ambitious for promotion to an executive desk of her own, she will resent the fact that her light will always remain under the employer's bushel. If she does declare herself, rather than the employer, to be the originator of a good idea, she will incur his enmity and the disapproval of those higher up, because executives dislike subordinates who insist upon getting credit.

> Can the following be said of you: "The thing I like most about X is that she is always the same. She is always friendly to everybody. She never has off days, and she doesn't throw tantrums."
>
> Much can be done while you are still on the campus to develop a smooth disposition. Something

that looks very important today may tomorrow appear quite inconsequential. Can you exercise your sense of humor when you feel yourself getting ready to "blow up"? Think of all the energy you can save!

Trait 8: Can You Keep a Secret? Without any intention of doing so, the secretary may carelessly divulge information that could seriously injure the business. Because of the confidential nature of her work, she must guard against letting slip some bit of information that may be worth many dollars to a competitor. For the secretary to say, "He left for Boston at noon," may seem harmless enough, but this information could easily give just the tip that will cause the company to lose an important contract.

> Are you the type of student who classifies all information into two groups — that which is too choice not to repeat and that which is not important enough to guard? Or if your roommate tells you something in confidence, can you be depended on to keep it to yourself?

Trait 9: Would You Rather Be Right Than Be Mr. R's Secretary? One secretary's employer was always losing important papers. One day he could not find a needed document and said that he was positive that he had given it to the secretary for safekeeping. At his direction she searched the files, but she could not find the paper. Later in the day it was found in the top drawer of the employer's desk. Instead of saying, "I thought so," the secretary said, "I wonder how we ever happened to put it there. My, I am glad that we found it." By saving her employer's face, she probably saved her job too. Hard to do? Yes, but it is worth doing.

A tactful person avoids the blunt way of saying a thing and always expresses himself in a way that will not offend. He will say, "Would you mind doing this?" rather than, "Do this, will you?"

Tact also includes saying the right things at the right time. It is tactful to remind the employer by asking, "Had you planned to work on the monthly report today?" He can say "Yes" even though he had forgotten all about it. Were you

to declare bluntly, "You will have to work on the monthly report today; it is due in two days," he could be justly annoyed at the implication that he had not thought of it.

Tact often is shown by the things one refrains from saying. If your employer has just discovered a mistake he made, it is far better to say nothing than to remark smugly, "Yes, I noticed that!" If you must tell him you noticed it, try to help him save face by saying thoughtfully and sympathetically, "I tried to think of some way we can correct it, but there doesn't seem to be any." Such a statement indicates concern over the employer's mistake.

At times it is tactful to be blind or deaf. For instance, should the secretary walk up to the employer's desk and find him writing a personal letter or check, she should not peer down to discover the details. She should transact her business and go on her way. If a secretary interrupts a confidential discussion or overhears a personal remark, she should not give any evidence of having heard a word.

The secretary is often called upon to supervise the work of others, and this she can do successfully only by exercising a great deal of tact. She must not act superior but must give the air of working *with* the other employees, giving judicious praise when merited. A well-liked secretary never forgets to say, "Thank you," to praise the work of others, and to pass along a pat on the back that comes to her ears concerning the work of subordinates.

> When you meet with the committee of which you are chairman, do you say, "I want you to get those reports made by Thursday"? Or do you say, "Will you please have those reports made by Thursday?" If you are asked by a teacher to collect the papers for a project, do you say, "Mr. X said for you to let me have your papers"? Or do you say, "Mr. X has asked that you let me have your papers"? What a difference the tactful choice of words can make! Are you growing in tact and in graciousness every day?

Trait 10: Can You Follow Through? One of the greatest assets of an efficient secretary is her ability to follow through a transaction from start to finish. From the time that she opens

the letter until the completion of the last detail which was mentioned in her employer's reply, the secretary maintains a tickler file on the transaction. She, not her employer, remembers to follow the negotiations through to completion. When the secretary is asked to help on gathering the data for a report, she is expected to obtain the specific materials from one or several sources, to put them into proper order, to identify them fully, and perhaps to type them in presentable form for inclusion in the report — all this work stemming from the original request of the employer to "obtain these data for me." X : 8)

The student, too, must follow through with her work. If you are soliciting advertising for the school paper and call upon a prospect who does not give you a contract this month, will you go back next month? If you are applying for a summer position and write a letter of application to which you receive no reply, do you follow up with a second letter or an interview? Many companies do not consider an applicant who does not follow through on his initial application, for they regard this trait as indicative of the potential success of the applicant.

H9

Trait 11: Can You Fit into the Office Picture? Every secretary owes it to herself to look as well as she can. She is selected for her position because she fits into the office environment. An employer chooses attractive and harmonious furniture for his office; one important factor that he considers in choosing his secretary is that she must look the part. She must "belong." Typewriters are streamlined; secretaries must be too. 55544

Not everyone can be beautiful, but everyone can be well groomed. Good grooming is not "fixing up" for special occasions, but an all-day, everyday habit. Several national magazines are devoted to helping the young career woman with hair styles and care, make-up, manicuring, carriage and posture, and wardrobe. Following the suggestions in such magazines will do much to help you to success on your job. Most college women are adept at personal care, and only a few cautions are necessary. One is that office dress is not the casual dress of the American campus. Sloppy sweaters and bobby sox are not acceptable in the office. In making the transition from the

campus wardrobe to a business wardrobe, probably a dress or a suit in one basic color will be the best choice. Then it can be varied by different accessories.

There is still another point about which some otherwise fastidious girls are lax. They do not use a nonperspirant. In the beginning position, there are times when the worker is very nervous, and perspiration may be a problem. The regular use of a nonperspirant should be part of the daily routine. Body odor and halitosis, too, can offend the employer to the point of costing a secretary her job. In one study of occupational adjustments of beginning office workers, this factor appears very high in the list. One who wants to attain secretarial status will be very vigilant about these personal matters. She will be fastidious, for she knows that neglect will be expensive.

The secretary should keep in her desk or locker a supply of handy helps to good grooming. Accidents do happen to one's clothing, and it is customary to put on fresh make-up before and after lunch. The following items are sufficient to meet simple emergencies and to do a rather thorough grooming job.

Needle and thread
Small safety pins
Cosmetics — face cream, powder, hand cream, etc.
Cleansing tissues
Manicure items — file, polish, polish remover, etc.
Hair pins
Comb
Tweezers
Paper towels

> Are you well groomed every day, or do you dress up only when you have a date? How are you on matching colors and types of clothes? Do you usually present a clean-cut, neat appearance?

The secretary's voice and diction also help her fit into the office picture. They play such an important part in personal magnetism that the good impression one creates on first appearance may be entirely overshadowed by an unpleasant voice or an ineffective manner of speaking. Shakespeare said much when he advised, "Mend your speech a little, lest it may mar your fortunes."

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QUESTIONS ON READINGS

1. What basic personality traits are necessary for success in any business position? Does the secretary differ from other office workers in respect to these traits?

2. What is meant by saying that office problems should be attacked on an intellectual rather than an emotional level?

3. What four steps must be taken to modify personality?

4. What methods of self-analysis have been available to you thus far?

5. Why do rating scales often provide for self-rating and also for evaluation by someone else?

6. Can the personality test be used in the selection of new employees? in the in-service development of employees for promotion or retention? Why?

7. What characteristics differentiate supervisory from non-supervisory workers?

8. Is personal appearance usually affected more by grooming or by inherited physical characteristics?

DISCUSSION QUESTIONS

1. How much initiative should the beginning secretary show?

2. To what extent should the secretary expect to be given credit for her work?

3. To what extent should the secretary have outside interests?

3. On a designated day, dress appropriately for the office. Each member of the class will type a comment about the personal appearance of every other member. These comments will be collected by the instructor for distribution to members of the class as a basis for improvement. Prove that you can be objective both in giving and in accepting the criticisms.

On the basis of criticisms, readings, and observation, prepare a chart listing the colors best for you, hair styles becoming to your face, lines best suited to you, and most effective make-up shades.

4. Read *Occupational Adjustments of Beginning Office Workers*, by Finkelhor, or other analyses of weaknesses of employees as listed by employers or employees. List the items which would cause you trouble at this time as a basis for your own secretarial training program.

5. What the secretary says to others in the office is important in determining whether her office relationships will be satisfactory or not. For each of the following situations write what you consider to be an appropriate secretarial comment.

(a) You have an important air-mail, special-delivery letter that needs to be taken to the post office immediately. You ask the office boy to run the errand.

(b) A stenographer who is under your supervision frequently forgets to return or to pay for stamps that she secures from you. What would you say to her the next time she asks for stamps?

(c) You are preparing for your employer an important, detailed report that must be completed tomorrow. Part of the data for the report must be compiled by the secretary to your employer's partner. She has promised to have the data ready today. When you check with her about it, she informs you that she will not be able to complete the work until tomorrow.

(d) A stenographer completes an unusually difficult assignment in very good form ahead of schedule and submits it to you for your criticism.

(e) You overhear one of your associates relating a story that is very uncomplimentary to your employer. You know that the story is absolutely false.

(f) You observe that a new calculating machine operator who is under your supervision wastes considerable time making personal telephone calls and writing personal letters.

(g) One of your associates reports that a file clerk occasionally takes a supply of paper clips from your desk during your absence without asking permission to do so.

(h) During dictation, your employer criticizes one of his superiors and asks you whether or not you agree with the criticism.

(i) Your employer brings you flowers for your desk from his garden at home.

(j) An insurance agent who is attempting to sell your employer a life insurance policy gives you a box of candy.

(k) Your employer unjustly criticizes you in the presence of another employee.

(l) Two weeks ago your employer agreed that you might be away from the office for two days next week to attend the wedding of one of your best friends in a neighboring city. From his dictation you learn that he is now planning a business trip for the same time.

PROJECTS

A. **Evidences of Desirable Personality Traits.** List the twelve questions on secretarial personality given in the marginal headings in the chapter, and under each question cite three ways in which you have an opportunity in your daily activities as a student to demonstrate these desirable personal qualities.

B. **Evaluating Yourself in Terms of Desirable Secretarial Qualities.** Prepare two forms listing the twelve questions on secretarial personality given in the marginal headings of this chapter and analyzed in Project A. On one form answer the questions in terms of your own personal evaluation. Ask a friend to use the second form for recording his evaluation of you.

C. **Building Up Your Secretarial Handbook.** Add to your collection of materials for a secretarial handbook any interesting or helpful items pertaining to secretarial personality and office relationships. Remember that your collection has only one purpose and that is to help you both during your period of secretarial training and when you are actually employed as a secretary. Your selection of materials will reflect your ability to choose between the important and the unimportant. Your goal should not be quantity; rather it should be carefully selected materials organized in such a manner that you can locate what you need easily when you need it.

As you proceed with your study of other matters in the following chapters, continue to add to your collection of materials pertaining to personality and office relationships. Likewise, if you should find new materials on other topics that you think will prove helpful to you, save them so that they may be properly classified later when you study those topics in this course.

CHAPTER 3

THE SECRETARY'S DAY

ALTHOUGH no two days in the secretary's work are exactly alike and no two secretaries follow exactly the same paths, still there is a certain basic pattern to which they conform. If the secretary will develop a routine for the activities that are constant, she will save time and increase her efficiency. She can, of course, plan her work; but she cannot always work her plan. Being sufficiently adaptable to make necessary modifications in her plans for the day is one of the secretary's greatest assets.

PLANNING THE ORDER OF DUTIES The secretary must exercise judgment about the order in which she performs duties. For instance, her employer will dictate letters and telegrams as he comes to them on his desk. The efficient secretary must select the most important items for first attention, leaving routine matters for later transcription. All day long she must do tasks in logical order, not in the order of their occurrence. Much of her value to her employer lies in her being able to choose wisely the duties that take precedence over others.

The secretary's work will have peak loads as well as slack periods when there will be time for catching up loose ends. Her activities will probably fall into three categories: (1) things to do at once; (2) things to do soon; and (3) things to do when she can find extra time. Daily assignments from the employer fall into the first two classes, usually into the first. The numerous records that the secretary keeps, but for which she alone is responsible, are usually in the third group — things to do when she can find extra time. On the other hand, certain items in the daily routine must be kept up to date under all conditions. Material that has been released for filing must not accumulate; the file box should be cleared every day. Nothing is more annoying to an employer than to go to

water carafe on her employer's desk. In other words, she personalizes the office home of her superior and makes it a place in which he can be comfortable and can work efficiently.

PREVIEWING THE DAY'S ACTIVITIES During the first minutes in the morning, the secretary finds time to preview the day's activities. She checks her employer's appointment book and her own and looks at the daily reminder file. She examines the tickler file to see which items she is to follow through immediately. She devises her plan for handling the day's work.

HANDLING INCOMING MAIL One of the first duties of the secretary when she comes to work in the morning is getting some of the morning's mail ready for her employer as soon as he reaches his desk. This activity involves reading the mail herself, assembling the information needed in answering it, and attaching any previous correspondence that is pertinent. If the employer and the secretary report for work simultaneously, there is usually only time enough for the secretary to do the mechanical part of opening the mail before turning it over to the employer.

ARRANGING DESK WORK AREA Some of the secretary's day will be given to arranging her desk. It should be organized as a work space. Nothing on it or in it should be retained that does not contribute to her daily routine, and all items should be arranged to expedite their handling. For instance, the stationery used in transcribing is usually kept in the first or second right-hand drawer in regular stationery trays. This drawer has sloping pockets for letterheads, carbon paper, second sheets, onionskin, and envelopes. The materials are arranged in the order in which they are used in assembling a carbon pack. If the second sheet is at the back, the hand reaches for it, moves forward to the next pocket for a sheet of carbon paper, and then in the front of the drawer gets the top sheet, the letterhead. Envelopes are either at the front or at the side.

The center top drawer contains frequently used supplies, such as paper clips, sharpened pencils, blotters, a ruler, rub-

and the office manual. Near the telephone is a memorandum pad with pencils, and within easy view is the daily calendar. File trays for incoming and completed work are conveniently placed.

REQUISITIONING SUPPLIES Offices follow various systems for replenishing supplies. Frequently the office boy collects requisitions from each desk and delivers the supplies requested. If this method is followed, the secretary should check her desk as part of her morning routine to see what stationery and other supplies she will need. She should order generously so that there will be no possibility of not having adequate supplies. In some offices she may have to go to the stock room and get the supplies herself. In others she may have to buy them herself during the lunch hour.

WORKING WITH THE EMPLOYER Soon after the employer reports for work, he will probably dictate. He may hand certain correspondence to his secretary and ask her to compose suitable replies. Before all the employer's dictation can be transcribed, the secretary may be interrupted for telephone calls, telegrams, callers, or errands. She may have to look up some type of business information, go to the bank, or report a meeting. She may be called for additional dictation — some of it of an imperative nature that will necessitate immediate transcription. She may have to complete a report due early the following morning. She may have to stop to answer the question of a stenographer who is helping her with a duplicating job. She may find it necessary to remind her employer to go to a board meeting that he has overlooked. She may have to get materials from the central files or put away items that have been completed. The rush of the day's activities is in swing, and judgment will determine the order of performance of the many duties.

The mail will be delivered several times a day. When it comes, the cycle of routine connected with answering it is set in operation again. Late in the afternoon, an effort is made to clear all pending mail and get it to the post office for night dispatch. The most efficient secretary is the one who takes the responsibility for verifying the fact that important letters actually get into the mail and are not lost in file baskets.

CLEARING THE DESK FOR THE NIGHT The secretary performs her duties in the order of their importance; but seldom will all items be cleared when she leaves the office at night. She will, however, check her desk to see that matters requiring her immediate attention have been handled. She will put away the unfinished work in such a manner that she can pick it up the following morning with little interruption. She will leave it in such order that somebody else can carry on if she fails to report for work. She will check her desk calendar to be sure that everything listed on it for the present day received attention, and she will take a look at the following day's schedule to see whether there are any details requiring today's preparation.

Typewriter manufacturers suggest that machines will wear longer if cleaned at night rather than in the morning. If possible, then, the secretary should clean her typewriter before she leaves it in the evening.

By staying at your desk for a few minutes after the rank-and-file workers have gone and by finishing your day in a leisurely way, you dispel the notion that you are a clock watcher, and you save the employer the annoyance of coming to your desk only to find you gone and some important rush item uncompleted. By saying, "Anything else? If not, I am leaving. Goodnight," you will add a service that the employer appreciates.

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QUESTIONS ON READINGS

1. If a secretary knows that she must adapt her daily activities to the exigencies of the situation, should she attempt to preplan her day?

2. What housekeeping duties should the secretary perform? Are such activities beneath the secretary's dignity?

3. What five types of activities precede the employer's arrival?

4. How should the secretary spend her time during slack periods?

5. What activities are involved in clearing the desk for the night?

6. Do you think that it should be necessary for the secretary to speak to her employer before she leaves the office at night? Why?

DISCUSSION QUESTIONS

1. If the secretary has regular work hours, is it fair to expect her to come in earlier than her employer?

2. Some secretaries say that the time before the employer arrives in the morning is too busy for warm-up typewriting exercises. Do you think that such activities should be included regularly in the secretary's plans? Why?

3. Should a secretary take rest periods during the day, or should she feel that her work is so important that she should remain at her desk for the half day?

4. Your employer frequently calls you for rush dictation late in the afternoon so that you must work overtime. With proper reorganization of his work much of this necessity for overtime work could be avoided. How could you suggest that he change his habits so that both of you could be more efficient and the overtime reduced?

5. What would you do if five o'clock came before you had transcribed the last of a number of important letters which your employer had dictated before he left the city for several days? Would you finish before going home?

PROBLEMS

1. To avoid overlooking items which should be done before the employer arrives in the morning, some beginning secretaries use a checklist of routines to be completed at the beginning of the day. Prepare such a checklist which any secretary might use. Organize your list so that the items may be readily checked off as completed.

2. Prepare a checklist similar to that in Problem 1 but containing items to be checked off before the secretary leaves the office for the day.

3. One way for a secretary to increase her typewriting efficiency is to devote a brief period each morning to warm-up and corrective typewriting drills. These drills are effective only if the secretary intelligently diagnoses her training needs.

(a) Develop a five-minute warm-up drill for general use.
(b) Develop a five-minute drill for a secretary whose work involves much statistical typing.
(c) Develop a five-minute drill for a secretary who makes many errors because of transposition of letters.

4. Arrange the model desk in your secretarial practice room in accordance with the suggestions given in this chapter. Prepare a list of the supplies that you have included. Have your instructor check your list and your desk arrangement.

PROJECTS

In many of the projects throughout the remainder of the textbook, you will be working as secretary to Mr. Robert L. Simpson, of the Continental Products, 320 Euclid Avenue, Des Moines 7, Iowa, performing a variety of duties that you might expect to do in the office of an executive of a large company. Mr. Simpson's letters cover a wide variety of situations, as he is the general manager of a company with widely diversified products. He is also very active in civic affairs and expects his secretary to handle many details relative to his personal affairs. You will use the stationery and forms that you would expect to find in the offices of the Continental Products.

A. Classification of Secretarial Duties. As secretary to Mr. Simpson, you will be expected to decide upon the order in which you will perform the many duties incident to your work. Prepare a form containing the following columnar headings:

To Be Done at Once	To Be Done Soon	To Be Done When Extra Time Is Available

List on the form the following duties in the columns under which the duties would normally fall. Consider as duties "To Be Done Soon" those which would be done sometime during the day after the "At Once" items were taken care of. (List each duty by number instead of writing it out.)

(1) Transcribe a telegram.
(2) Address notices of a meeting to be held a month from today.
(3) Prepare a manuscript for mailing by air mail to a trade magazine.
(4) Write up the minutes of a board meeting held yesterday.
(5) Transcribe a letter telling the applicant that there is no vacancy.
(6) Transfer material to the dead files.
(7) Clean out your own desk.
(8) Make a routine bank deposit.

(9) Deliver pay checks to members of your department.
(10) Type a new organization chart for the department.
(11) *Locate and file the telephone numbers of all the members* of the Kiwanis Club, of which Mr. Simpson is secretary.
(12) Transcribe a recorded telephone message.
(13) Send a form letter to a group of customers whose accounts are slightly delinquent.
(14) Remind Mr. Simpson of an important appointment.
(15) Prepare Mr. Simpson's income tax report for quarter ending tomorrow.
(16) Make a hotel reservation for a trip which begins tomorrow.
(17) Prepare an inventory of office furniture for insurance records.
(18) Type the lease for a property that Mr. Simpson has just rented to a man whose occupancy begins in two weeks.
(19) File all the materials transcribed today.
(20) Confirm a speaking date for Mr. Simpson for a meeting to be held two months from date.
(21) Renew the subscriptions to all the office magazines.
(22) Pay the insurance that is due within a week.
(23) Type an annual report to be presented tomorrow.
(24) Duplicate agenda for a sales meeting to be held three days hence.
(25) Pick up tickets for Mr. Simpson's trip next week.
(26) Correct the page proof for the office manual.
(27) Post payroll items to the personnel cards of the employees in your department.
(28) Clip an item about an honor conferred on Mr. Simpson and paste it in his scrapbook.
(29) Read an article about the development of a new process by your company.
(30) Complete a rating scale for your subordinate.
(31) Transcribe the dictation of answers to a questionnaire from a graduate student writing a thesis about office procedure.
(32) Telephone a client that Mr. Simpson will not be able to see him tomorrow morning.
(33) From the monthly telephone bill check the allocation of calls to the proper departments.
(34) Develop a list of short forms for words occurring frequently in your dictation.

PART II

SECRETARIAL HANDLING OF OFFICE MAIL

CHAPTER 4

PROCESSING INCOMING MAIL

THE nature of the incoming mail largely directs the activity pattern of the business day. To be permitted to read and digest the mail is a responsible trust. It definitely places the secretary "in the know" on almost all important happenings. It offers a real opportunity for her to learn the details of practically every current piece of business. By absorbing those details, the secretary is able to render more intelligent and more helpful service to the employer. The person who can carry the details for the employer so that he is free to concentrate on the major aspects of his job—policies, principles, and procedures—is giving real secretarial service.

The secretary's handling of incoming mail involves much more than the mail clerk's routine of opening, dating, and sorting it. Although it may be necessary for the secretary to do these routine tasks, her handling of the mail includes much more important steps. The secretary can help the employer to save many minutes each day by reading each letter, underlining the important words and phrases, annotating in a margin the suggested disposition of routine letters, attaching informative previous correspondence if necessary, and sorting the mail and placing the most interesting and the most vital correspondence on top.

Handling the incoming mail is a step-by-step procedure that requires efficient organization and intelligent application of one's knowledge of the employer's business.

TIME OF OPENING THE MAIL Business offices receive several mail deliveries each day. Each mail delivery is attended to just as soon as it is given to the secretary, and the secretarial routine is the same for each. Normally, however, the first mail in the morning is the heaviest. The efficient secretary will want to have some of the mail ready for her employer when he reports for work.

PRELIMINARY SORTING OF THE MAIL When it is the secretary's responsibility to open some or all of the envelopes, she will find it advantageous to make a preliminary sorting of the mail first. Ordinarily the mail falls into the following five main classes:

(1) Personal or Confidential Mail. Envelopes that are marked "Personal" or "Confidential" should be put aside after the preliminary sorting is completed, because they are given to the employer unopened. This group does not include envelopes that bear attention lines only. An attention line is used for the purpose of bringing a business communication addressed to a firm to the attention of a particular person. The contents are not confidential.

Letters written in longhand or on social stationery are often of a personal nature, and the secretary should exercise more than usual judgment before opening them. She should also know her employer's wishes before she opens letters from her employer's bank.

(2) Air Mail. The fact that a letter has been sent air mail usually indicates that the letter is important, at least from the sender's point of view. The employer will usually prefer to give early attention to letters in this group.

(3) Regular First-Class Mail. Most of the incoming mail will fall into this classification. The process of opening these envelopes can be expedited if they are sorted further according to size or subject matter as revealed by the type of envelope. Window envelopes, for example, usually contain invoices or monthly statements of account. Remittances from customers may be enclosed in distinctive colored envelopes that are provided by the business. Orders may be enclosed in envelopes of another distinctive color or in business reply envelopes for which postage is paid by the business upon their receipt. Mail received from branch offices may also be segregated.

(4) Third-Class Letters. Much advertising literature is sent in postage-saver, open-end envelopes that require less postage than first-class mail. These envelopes can be spotted at once because they usually do not have stamps affixed or metered postage imprinted on them; the postage is indicated by a printed

permit. Although the employer may be interested in some of the matter contained in this group of letters, he probably will want to lay them aside until more important matters are taken care of.

(5) *Magazines.* Trade journals, magazines, catalogs, and similar materials constitute a separate classification of the incoming mail, not only because of their nature, but also because of their size.

The combination or double envelope requires special handling. The bulky material in the large third-class envelope is removed, but the material in the first-class envelope is sometimes overlooked.

MAIL HANDLED SEPARATELY Special-delivery and registered letters are not delivered to the office with the regular mail. They are handled promptly when they are received and are brought to the attention of the executive immediately. Should a special-delivery or a registered letter be included with the regular mail, the secretary should give it to her employer as soon as she finds it in the process of preliminary sorting.

OPENING ENVELOPES Regardless of the organization of the office, the secretary will usually have some letters to open by hand. This may be done in one of several ways. Some secretaries belong to the time-wasting "scissors" group who meticulously cut off the end of each envelope; others tear off an edge or rip up the flap by hand, although this is obviously an inefficient method. It does not make too much difference what kind of routine is used so long as it is not time consuming. A good method is to stack the envelopes with the address side down and with the flap edges facing the same direction, so that the paper knife can be quickly inserted under each flap edge and the envelope opened with one quick stroke. When this method is used, there is little danger that the contents of the envelope will be damaged by the knife.

In a large business, communications addressed to individuals may be given to those persons or their secretaries before the letters are opened, but mail that is addressed to the firm is usually opened by the mail clerk, the switchboard operator,

LETTER OPENER

This desk model trims a thread-like edge off any size envelope.

the receptionist, or the office boy. If the volume of mail is large, the office probably finds it economical to use an automatic envelope opener that may be hand operated or motor driven. A machine of this type holds a pack of letters against a plate, and the letters are conveyed, one at a time, to a revolving knife, which cuts a narrow strip off the top of the envelope. An electrically driven letter opener will open several hundred envelopes a minute. Although there is little possibility that the contents of the envelopes will be mutilated in the cutting process, the operator should take the precaution of jogging the envelopes on a flat surface before they are placed in the machine so that their contents will rest against the bottoms of the envelopes.

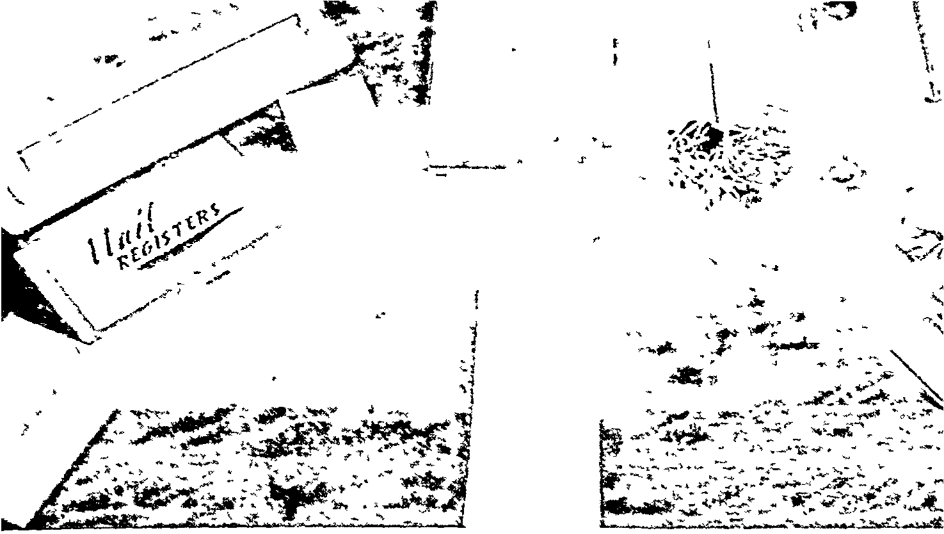
REMOVING THE CONTENTS OF ENVELOPES Removing the contents of envelopes is a purely mechanical routine that involves nothing more than an efficient arrangement of materials and supplies so that there will be no time-wasting movements of hands and arms. *The steps in the routine are:*

(1) Arrange a space on your desk or on a table large enough for freedom of action.

(2) Place the needed supplies in an accessible spot. These supplies include stapler, pins, paper clips, pencil, colored pencil, time stamp, transparent tape, and paper weights.

(3) Place a stack of open envelopes directly before you with their backs up and the envelope tops at the right if you are right handed. Letters unfold naturally if they are removed from the envelopes in this manner.

(4) Remove the contents from each envelope, beginning with the foremost or top one. Lay the envelope in a clear space at the left. Unfold the letter with the left hand so that the right hand, holding a pen or pencil, is free for making notations,



OPENING THE MAIL

Notice that after the letter opener has been used, it is put to one side. Within easy reach for notations are the tickler file, mail registers, routing slips, and desk appointment calendar. The opened envelopes are stacked in front of the secretary, and the time stamp and rubber stamps are handy, as are rubber bands, clips, and transparent tape.

After the contents of the envelope are removed, they are kept flat. Fasten any enclosures to the letter, and lay them face down in a clear space at the right. Enclosures that are as large as or larger than the letter sheets should be fastened to the back of the letter; smaller enclosures should be attached to the front of the letter. If the letter or an enclosure has been cut in the process of opening the envelope, it should be repaired with transparent tape. Keep the emptied envelopes and the pieces of mail in the same order in their respective piles so that it will be easy to locate a particular envelope later if needed.

Be sure that all contents of each envelope are removed. Hold the envelope up to the light if necessary. In interoffice mail, envelopes are often perforated so that the mail clerk can see any papers that might inadvertently be left in the envelope.

DATING AND TIME STAMPING The date on which a secretary receives a letter on her desk is important to her and to her employer. There are several reasons why every piece of incoming mail should be dated when received.

(1) If a date of receipt is stamped on the face of the mail, the person responsible for answering it will try harder to get

his reply in the mail quickly. When a letter is routed to several people in the office before its final disposition, everybody in the chain will make a greater effort to clear it soon if he realizes that his co-workers will know if the letter lies on his desk. All letters should be regarded as goodwill builders for the company; but no reply which is unduly delayed — no matter how courteous or affable it is — will promote good business relations.

(2) A letter may have arrived too late for the recipient to take care of the matter to which it refers. The date of receipt on its face will provide explanation for inability to comply with the request.

(3) The letter may be undated. In this case the only clue to its date, after it has been filed, will be the memorandum of the date when it was received. You may find it hard to believe, but it happens frequently that a letter is sent out without a date — even letters typewritten by secretaries.

The mail may be dated in pencil by writing the date in abbreviated form in some convenient place on the face of the letter, such as the space between the printed letterhead and the body of the letter. The abbreviated date form for January 13, 1950, is 1/13/50 or Jan. 13, 50. There is no reason for writing out the date in full.

More likely the secretary will use one of the date- or time-stamp devices that are available in various models. The simplest type is the revolving rubber stamp, set and operated by hand, that prints merely the abbreviation "Rec'd" and the date. The automatic machines contain electric or special clocks. The imprint made by these may be one line giving the hour, the minute, the month, the date, and the year, or it may be a clock-dial imprint with hands pointing to the time and the date in the center or outside of the circle. Most of these imprints include also a word or two, such as "Received" or "Order Department."

DISPOSITION OF ENVELOPES Some companies require that the empty envelope be stapled or pinned to the back of each piece of mail. When this practice is not a requirement, the empty envelopes should not be discarded at

once. A rubber band can be placed around each bundle, and the envelopes can be put aside for at least one day.

The empty envelopes will be needed under any one of the following circumstances:

(1) When the envelope is incorrectly addressed. When the employer dictates his answer to a letter enclosed in an incorrectly addressed envelope, he will call attention to this fact so that future correspondence from the same person will be addressed correctly.

(2) When the letter was delivered to the wrong person or business and had to be forwarded. This information is valuable not only for the same reason given in (1), but also because it will explain the reason for a delayed answer in the handling of a request or an order.

(3) When the letter does not contain a return address but the envelope does.

(4) When the return address on the letter differs from that on the envelope. Sometimes an individual uses business, hotel, or club stationery and does not indicate his return address on the letter, even though the answer to his letter should not be sent to him at the address given in the letterhead.

(5) When the date on the letter differs too much from the date of its receipt. A comparison of these dates with the date and the time in the postmark will reveal whether the fault lies with someone in the sender's office or with the postal delivery service.

(6) When neither a handwritten nor a typewritten signature appears on the letter. The name of the sender may appear as a part of the return address on the envelope.

(7) When an enclosure indicated in the body of a letter or in the enclosure reference line is not attached to the letter. The enclosure may have been left in the envelope when the letter was removed.

(8) When the letter submits a bid, or an offer or acceptance of a contract. The postmark date may be needed as legal evidence in litigation involving such matters.

(9) When an interoffice envelope is used. When these are used again, the name of the addressee is written on the next blank line on the face of the envelope.

READING, UNDERLINING, AND ANNOTATING Some secretaries might consider their work finished when the duties of opening the envelopes and removing and dating their contents are completed. But now begins the interesting part of handling the mail. The first step is to *read* each letter through once, concentrating on it while reading. The second step is to *underline* those words and phrases that tell the story. The secretary should be thrifty with underlining. Attention should be called only to the necessary words and phrases. Underlining is a fairly new secretarial service, and therefore not every employer is accustomed to it. He will be quick to appreciate, however, the surprising number of minutes underlining will save him each day by reducing his reading time on each piece of correspondence. The secretary gains, too, from reading and underlining, for it helps to imprint a concise record of each letter on her mind.

The third step is to *annotate,* that is, to write in a margin on the face of the letter any necessary or helpful note to the employer relative to the communication. Marginal annotations come under two headings. The first type of marginal annotation states the suggested disposition of routine letters, such as "File," "Ack" (for acknowledge), and "Give to Sales Department." Such disposition is usually what the employer will ultimately suggest. The secretary merely anticipates his decision and saves his time by writing it for him. The employer ordinarily returns such annotated mail to the secretary for handling. Occasionally the employer may disagree with the secretary's suggestion and retain the letter for his own handling. The second type of marginal annotation consists of special notes, such as "See our last letter attached" (which the secretary will have removed from the files and attached to the annotated letter), or "You verbally promised to make this address when Mr. B was in." Such notes are usually reminders, although some may be of the identifying type, that is, a brief "who's who" of the writer or the company if the secretary feels that such information will be helpful to the employer.

LANGDON-HARRIS SUPPLY COMPANY

309 SOUTH BROADWAY
ROCHESTER 2, NEW YORK

July 20, 195-

JUL 21 1 20 PM 195-

Mr. J. R. Randolph
Kline & Emerson
516 East Fourth Street
Jamestown, New York

Dear Mr. Randolph:

Thank you very much for your order of July 15. We have shipped the materials by express as you requested. Your invoice is enclosed. Please let us know if you do not receive the shipment within a reasonable length of time.

The question that you raise regarding the use of a card file for your test data is an unusual one, and we hesitate to make a recommendation until we know more about your problem. Our representative, Mr. E. J. Bailey, who is located at 601 East Third Street in Jamestown, will be glad to discuss this matter with you in detail. He will call you in a few days to make an appointment. Feel free to use his services without obligating your company in any way.

Please substitute the enclosed copy of our latest price list for the copy you now have on file.

Yours very truly,

LANGDON-HARRIS SUPPLY COMPANY

E. M. Marshall

E. M. Marshall, Sales Manager

RH

Enclosures
Invoice ✓
Price List

no

Mr. Bailey called this morning while you were out. I scheduled him for an appointment next Tues. at 10

LETTER READY FOR ACTION

The time stamp and annotations indicate that this letter is ready for the employer.

When an envelope does not contain a stated enclosure. Underline the mention of the enclosure or the enclosure reference at the end of the letter, carry the line to the margin, and write a conspicuous "No."

When an envelope contains a bill or an invoice. If possible, verify the prices and the terms with those quoted. Always check the mathematical accuracy of the extensions and the total. Then write "OK" on the face of the bill or the invoice if it is correct, or a note about any discrepancy.

When an envelope contains money, a check, or a money order. Check the amount enclosed with the amount mentioned in the letter or indicated on the statement or the invoice. In some offices, moneys received are turned over immediately to some person in the accounting department. In that case indicate in the margin the amount of money that was enclosed. In many offices a *remittances received register* is maintained.

When a letter refers to a package that is being sent under separate cover. Make a note on the desk calendar (which should be the perpetual type and not the tear-off, day-by-day kind) several days ahead that a certain package is due or you may keep a register of packages expected. When the package is delivered, cross out or check off the entry. It may be necessary to give the mail clerk or the receiving clerk a memorandum to the effect that you are expecting a package. Include in this memorandum the name of the sender. In a margin of the incoming letter, write "Noted" or "Follow up."

Date of Entry	Article	From Whom	Date Sent	Department	Individual	Date Received
3-12	Catalog	A. H. Martin & Co.	3-11	Purchasing		3-14
3-14	Book	J. Stevens	3-12	Advertising		3-18
3-18	Tickets	G. H. Simms	3-15		P. L. Martin	3-21
3-20	Folders	Kimball Bros.	3-18	Filing		3-23
3-22	Catalog	Bryce & Maye	3-20	Purchasing		

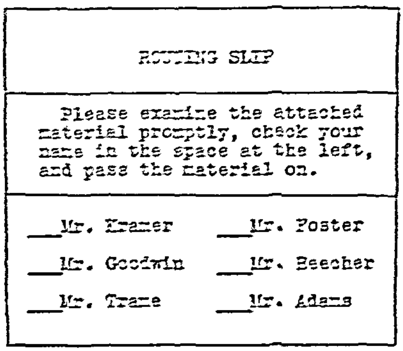
MAIL EXPECTED UNDER SEPARATE COVER REGISTER

The first four items that were expected have been received; but the last item, a catalog from Bryce & Maye, has not yet arrived.

When you inadvertently open a personal letter. Stop reading the letter as soon as you discover that it is personal and not business. Refold the letter, replace it in its envelope, and attach a short note to the face of the envelope, "Sorry, opened by mistake, K. A." (Secretaries and employers, in order to conserve time and to eliminate formality, address and sign notes to each other with initials instead of full names.)

When a letter addressed to the employer actually should have been sent to another department head. Annotate the correct person's name and the department in the top margin and send the letter with the other mail to the employer. He will probably ask you to send it on, but he should see it first because it is addressed to him.

When a letter should be circulated among several other members of the staff after the employer reads it. Annotate the proper names in the margin, or attach a correspondence routing slip such as that illustrated. *The routing slip should be pinned or stapled to the letter, not paper-clipped.*


ROUTING SLIP

Please examine the attached material promptly, check your name in the space at the left, and pass the material on.

___Mr. Kramer	___Mr. Foster
___Mr. Goodwin	___Mr. Beecher
___Mr. Trane	___Mr. Adams

ROUTING SLIP

If mail should be seen by several persons, a routing slip is attached to expedite handling.

When books and magazines are received. Identify each one permanently with the employer's name or initials. Scan the table of contents and indicate any articles the employer will probably want to read. This is a minor but helpful service a secretary can give after becoming acquainted with the employer's interests.

FINAL SORTING The concluding step is assembling the mail into some reasonable sequence. Lay it out into groups of like kinds, such as checks, bills, orders, important letters, complaints, advertisements, books, and magazines. Then arrange each group in order within itself. Finally, stack the groups one on top of the other in some orderly, intelligent plan. Those things that concern the employer most should have topmost position. A new secretary naturally must become familiar with her employer and his work in order to do a good job on the sequence of the mail. She may find the following arrangement satisfactory:

Personal Letters
Letters of Special Importance
Orders
Pleasant Letters
Checks
Unpleasant Letters
Routine Letters
Bills
Advertisements
Magazines

A final secretarial precaution is to place the mail on the employer's desk in such a way that no one else can read the top letter. This can be done by turning the top letter face down or by putting the mail inside a file folder. If necessary, the mail can be securely held down with a paperweight.

WHILE THE EMPLOYER IS AWAY Some of the letters that come to the employer's office while he is out of town can be handled by the secretary. Others she may pass on to someone else for action. Some may be of such a nature that they will require the employer's personal attention and will have to be forwarded to him or acknowledged and held for his return.

The method of handling the employer's business letters depends largely upon the length of time he is to be away. If it is an absence of only a day or two, most of the mail requiring his attention can await his return. If he is to be gone a week, the secretary should acknowledge receipt of the letters and explain that they will have the employer's attention as soon

as he is back in the office. If he is to be away on an extended trip of several weeks, his business mail should be forwarded to him every two or three days. When this is done, a copy of each letter should be made, and either the originals or copies, as the employer prefers, should be forwarded to him with a covering letter. The other set should be kept on file so that it will be available in case the forwarded mail is lost or in case someone else in the office has occasion to refer to it before the employer returns.

The employer's personal mail should not be opened while he is away. It can be kept at the office or forwarded to his out-of-town address. To forward an unopened letter, write on the face of the envelope *Forward to* followed by the correct address. Make for the employer a record of each letter forwarded, noting the name of the sender or the postmark, the date of forwarding, and the address to which it was sent.

A thoughtful secretary holds each piece of mail received during the employer's absence on her desk with a note as to her way of handling it and shows it to him on his return. When a dean in a large university was asked what he liked most about his secretary, he explained that when he was away from the office, she answered all of the letters or acknowledged them. He said it was a pleasure to return and find the mail in such good shape. The correspondence, with carbons of her answers or acknowledgments, was always on his desk, and he could learn very quickly what had happened in his absence and what needed his immediate attention.

REFERENCE READING

National Office Management Association. *Manual of Practical Office Short Cuts.* New York: McGraw-Hill Book Company, Inc., 1947, pp. 132–142.

QUESTIONS ON READINGS

1. How does the secretary's handling of the mail differ from the mail clerk's activities?

2. Should the secretary open, read, underline, and annotate special-delivery letters before she gives them to the employer? registered letters?

3. When should the envelope of an incoming letter be retained?

4. When the secretary considers it necessary to attach the envelope to an incoming letter, how can she indicate to the employer her reason for doing it, so that he will not need to waste time in trying to determine the reason?

5. How does reading, underlining, and annotating the incoming mail help the secretary to handle her employer's dictation more efficiently?

6. Why should incoming mail be date stamped? Where should the notation be placed?

7. How would you indicate an article in a magazine that you think your employer would be interested in reading?

8. In preparing the incoming mail for her employer, what should the secretary do—

(a) When a letter refers to previous correspondence?
(b) When the envelope contains a bill or an invoice?
(c) When an envelope does not contain a stated enclosure?
(d) When an envelope contains money, a check, or a money order?
(e) When a letter refers to a package that is being sent under separate cover?
(f) When a letter addressed to the employer actually should have been sent to another department?
(g) When a letter should be circulated among several other members of the staff after the employer gets it?

DISCUSSION QUESTIONS

1. In what ways does the secretary's understanding of her employer's business aid her in discharging the responsibilities connected with the incoming mail?

2. How would you handle the situation in which you had inadvertently opened a letter addressed to your employer and marked *personal?* What would you do in case the envelope had never been sealed?

3. In opening and reading the mail, you find a letter calling attention to the fact that an enclosure was missing from a letter which you had transcribed and mailed last week. What would you do?

4. Which do you think is the more efficient procedure—to empty each envelope as soon as it is opened, or to open all envelopes first before removing their contents?

5. What steps could you take to obtain the address of a person who inquired for information and prices on your product when

the request was typed on a plain sheet of paper with no address given on either the letter or the envelope?

PROBLEMS

1. Much loss of time and money results from a poorly organized routine for handling incoming mail. Prepare a written list of your criticisms of the following procedure, identifying your criticisms with the letters indicating the five steps. Then type your revision of the procedure.

Step A: The secretary arranges all of the mail in a neat pile and proceeds to open it in sequence.

Step B: She flattens out the letters and enclosures and discards the envelopes.

Step C: After all the letters have been opened, she checks the letters for stated enclosures. She separates the enclosures from the letters, enters remittances in the remittance register, sends orders to the order department, and discards most of the advertising circulars.

Step D: She then time stamps, reads, underlines, and annotates all letters. She prepares a routing slip for letters requiring the attention of more than one person, and she fastens each routing slip to the proper letter with a paper clip.

Step E: She then places the letters, in the order in which they were processed, on the employer's desk face up for his immediate attention.

2. Assume that your employer is out of town but expects to return tomorrow. Type a brief statement indicating what you would do about each of the following:

(a) An air-mail, special-delivery letter requesting an estimate on a large quantity of coated paper.

(b) A telegram from one of your salesmen sending in a rush order for one of his customers.

(c) A letter about a shipment of card stock complaining that one fourth of the blue is two shades lighter than the rest. Samples are enclosed in proof.

(d) A letter asking the length of time a Mr. Exman was employed as a salesman by your company and his reason for leaving, and requesting a reference.

3. Arrange the model desk in your secretarial practice room for opening and sorting incoming mail. Prepare a list of supplies needed. Have the instructor check the list and your demonstration of letter opening and sorting techniques.

PROJECTS

A. Using Record Forms in Handling Incoming Mail. In your office the following three registers are kept:

(1) Remittances Received
(2) Mail Expected under Separate Cover
(3) Insured, Special-Delivery, and Registered Mail

The following mail was received. Record the information in the appropriate register. If these registers are not available for your use, draw up appropriate forms

May 16: Received a letter stating that a catalog was being sent by Gem Stores. (A catalog always goes to the sales manager.)
May 16: Mr. Simpson received a registered letter from the First National Bank, of Tulsa.
May 16: Received $27.70 from Henry Dorset in payment of account (check).
May 16: Received $145 from Smith Brothers to apply on account (check).
May 17: Received $24.50 from H. Dick in payment of account (check).
May 17: Received a bank draft from the Jones Realty Company for $39.80 in payment for repairs.
May 17: Received a telegram saying that page proof had been mailed to Mr. Simpson by ABC Printers.
May 17: Received insured cuts from the Thompson Engraving Company.
May 17: Received a letter stating that the Royal Typewriter Company had asked its local branch to send us a copy of a booklet on typing short cuts.
May 18: Received the catalog from Gem Stores.
May 18: Received page proof referred to in the telegram from ABC Printers
May 18: Ordered five reams of special letterheads for use in your office to be sent parcel post by ABC Printers.
May 18: Received a registered letter from Herbert Anderson, lawyer, addressed to Mr. Simpson.

B. Reading, Underlining, and Annotating Letters. The purpose of this project is to provide practice in the handling of incoming mail. First of all, type the two letters in good form. Then prepare them for the desk of Mr. Simpson, by reading, underlining, and annotating. Any action which you would take which is not covered by the annotations should be stated at the bottom of each letter. The letters were received on May 18 of the current year.

Letter 1

BENSON AND JONES
Wholesale Grocers
512 Eighth Street
Des Moines 6, Iowa

May 16, 195-

Mr. Robert L. Simpson
Continental Products
320 Euclid Avenue
Des Moines 7, Iowa

X:87
H9

Dear Bob:

In the talk which you gave at the Rotary luncheon yesterday, you referred to materials included in *Business Ideas Handbook.* I am interested in obtaining more information on the subject and would appreciate your providing me with the name of the publisher, author, publication date, and price.

I am enclosing a stamped, self-addressed envelope for your convenience.

55544

Cordially yours,
Henry Benson

HB:ac
Enclosure: Self-Addressed Envelope

Letter 2

THE EMPORIUM
Washington, Iowa

May 17, 195-

Continental Products
320 Euclid Avenue
Des Moines 7, Iowa

Gentlemen: Attention of Robert L. Simpson, General Manager

We are enclosing our check for \$209.25 in payment of your invoice of April 6 for \$212.50, less 2 per cent discount.

Will you please advise us if you have sufficient stock on hand to forward us 1,000 units of #3845.

Yours very truly,
THE EMPORIUM

Harry Morris, Manager

HM:EP
Enclosure: Check

CHAPTER 5

TAKING DICTATION

THE secretary has no responsibilities more important than those of taking dictation and transcribing dictated materials into communications and reports that are accurate and in good form. Although she must be able to discharge capably numerous other office duties, the secretary must first of all be an expert in putting the employer's dictation into written form.

In many offices the dictation is begun as soon as the employer has gone over his mail. In anticipation of the call to dictation, the secretary makes complete preparation. Supplies are assembled — a notebook or two, a filled pen and sharpened pencils (one of which is colored), and a list of items to be discussed with the employer. Reminders on her desk calendar may suggest to her that she ask a question about work which is in process or which is scheduled for the immediate future. She may wish to call her employer's attention to appointments or deadlines that are imminent. It saves his time and patience for the secretary to ask, as far as possible, all questions and to pass on all reminders at one time rather than to interrupt him repeatedly during the day. In actual practice, therefore, the secretary prepares for a dictation-conference period.

LEARNING YOUR EMPLOYER'S VOCABULARY

The office manual, which is being increasingly used to orient a new employee to his position, sometimes contains a list of terms peculiar to the type of business. The secretary can use this list advantageously to acquaint herself with the vocabulary of the business, and she can develop special shorthand forms for such words.

The larger a secretary's vocabulary, the easier it is to write and transcribe shorthand notes intelligently. It is amazing how much wild guessing is resorted to by stenographers with limited vocabularies. The stenographer who turned *connoisseur* into *common sewer* made the error because the

word dictated was obviously not in her vocabulary. Equally infamous are the following senseless sentences actually submitted in correspondence:

> He made an ambitious statement. (*ambiguous*)
>
> The applicant possesses strong personal iniquity. (*integrity*)
>
> He was impetuous to argument. (*impervious*)

The secretary must develop a wide general vocabulary as well as a specialized one. She must have not only a reading vocabulary but also a "hearing" vocabulary so that she can recognize her employer's words by sound. The secretary can add to her business vocabulary by referring to her employer's previous correspondence and compiling a list of unfamiliar words for dictionary study, spelling drill, pronunciation (very important), and shorthand writing practice. She can also become an avid reader of trade magazines in the field of her employer's work, collecting written lists of new words as she increases her background of information. A third source of help in building vocabulary is reference to secretarial books available in various special fields, such as medicine, chemistry, law, aviation, and engineering.

ANSWERING THE CALL TO DICTATION When the call for dictation does come, the secretary follows the inflexible rule of never looking annoyed or irritated at being interrupted. She walks to the employer's desk with a pleasant, friendly, co-operative attitude. Should the employer ring for the secretary while she is talking on the telephone or while she is talking to a visitor or to another executive, she should excuse herself for a moment and inform the employer immediately of what she is doing. If it would be awkward to leave the person for a brief time, she may ask a subordinate to inform the employer for her.

Whenever the secretary expects to be away from her desk for some time, she should tell a subordinate and ask her to take over the secretary's usual desk responsibilities until she returns. Such duties may include answering the telephone, opening the mail, and acting as a receptionist. By turning these duties over to someone else, the secretary makes sure

that nothing of importance will be neglected in her absence. If the secretary finds it necessary to leave her desk unattended — and this should occur rarely — she should place a pad on the top, indicating the length of time she expects to be away and her destination.

TYPES OF DICTATION TO BE TAKEN The dictation which a secretary takes differs from that taken by a stenographer. Ordinarily the latter is given letters to transcribe, and that is all. A secretary, however, may also take instructions, reminders, and requests; and she may receive mail to answer herself. She may be given first a letter, then an interoffice communication, then a telegram, then a request to go to the bank at lunch hour to get a fifty-dollar check cashed, then another letter, then instructions on a tabulation of sales costs, then a request to copy certain paragraphs from a magazine article, and then a memorandum to get an appointment for the employer with the mayor. One of the annoying faults of an inexperienced secretary is her reluctance to write anything except actual dictation. She relies on her memory to fulfill these special orders instead of recording instructions in black and white.

Dictation falls into five categories, each of which requires different treatment.

(*1*) *Dictation to Be Transcribed.* This category includes correspondence, reports, speeches, outlines, telegrams, and articles for publication. Most dictation is of this type.

(*2*) *Dictation of General Instructions.* When the secretary is learning her job, or as new techniques are evolved for facilitating routines, her employer will give general instructions relative to all work. These may be written inside the front or back cover of the notebook, later to be transferred to an office manual incorporating all such instructions.

(*3*) *Dictation of Instructions for Handling the Transcription of Specific Notes.* Obviously these instructions must precede the specific dictation in the notebook although the dictator frequently gives them after the context. A notation to make five carbon copies would be worthless at the end of a letter. Because such instructions require unusual attention, many secretaries write them in colored pencil above the material to

SECRETARY TAKING DICTATION

Note the technique used in sliding up the notebook page.

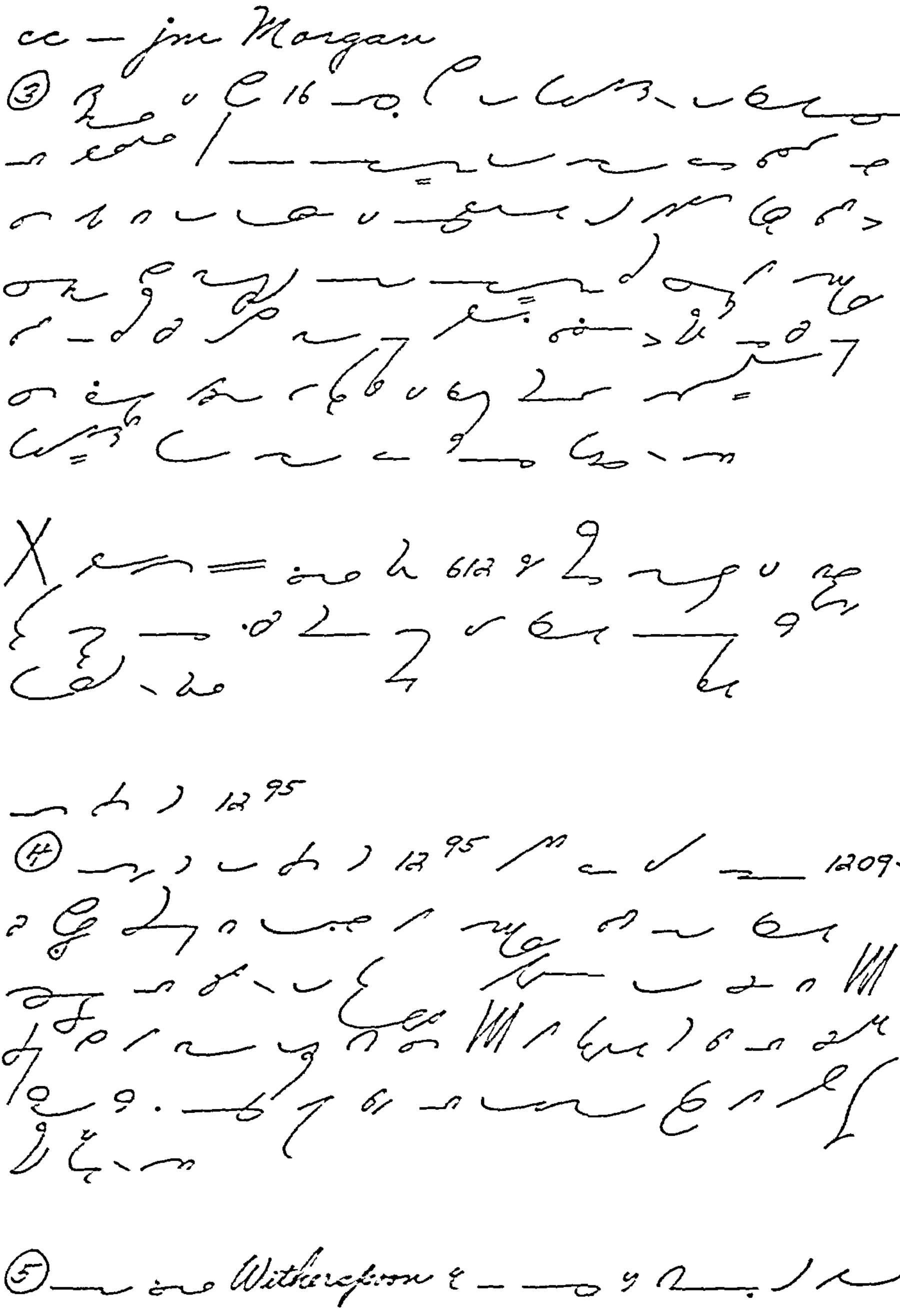
(1) Have one place in or on the desk for the notebook.

(2) Take two notebooks to dictation when the end of the book in use is near. The employer especially dislikes having the secretary leave to get supplies. Because the employer may want to dictate at an unexpected time, it is also well to keep one notebook in his office if there is a suitable place for it.

(3) Keep a rubber band around the pages in the notebook that have been transcribed.

(4) Keep a filled pen and sharpened pencils underneath the rubber band ready for work.

(5) Write the date (day, month, and year) conspicuously at the beginning of each day's dictation. Many successful secretaries use colored pencil for making this notation.



PAGE FROM THE SECRETARY'S SHORTHAND NOTEBOOK

Note the following: (a) The encircled numbers that are used to identify the letters are the same as those appearing on the related incoming letters; (b) A distinctive mark is used to identify the telegram; (c) A special symbol is used in the notes for letter No. 4 to indicate a change of thought by the dictator.

(13) When the employer finishes dictating an answer to a letter and hands it to you, turn it face down on top of the last one, thus keeping the correspondence in the order of dictation. Some employers use a numbering system in dictating answers to letters. In such a case write each number in your notebook; you need not write the full name and the address of the person to whom each letter is going. The number identifies your notes and the letter answered. Such a system saves time during the dictation, but it is usually necessary to write the name and sometimes the address in the notes during transcription. Otherwise it would be very difficult later to find specific notes in the book because there would be no way of knowing to whom each letter was sent.

(14) File completed notebooks. The cover of a filled book should show the secretary's name, the dictator's name, and the inclusive dates of the dictation.

(15) Regard dictation as a co-operative effort of your employer and yourself. Too often during the training period, dictation is a competition between teacher and pupil. If the student does not get down the shorthand, nothing can be done about the situation. Actually the secretary and the employer are working together to achieve a single objective, dictated notes which may be read easily.

INTERRUPTING THE DICTATOR Just as it is an unwritten law that the audience be pin-drop quiet at a symphony concert, so it is that the secretary be both vocally and physically quiet during dictation. Her opportunity to talk comes when the dictation is completed. There are, however, a few exceptions. One is when the dictator is so far ahead of the secretary that the thread of the dictation is being lost. Then it is permissible to look up inquiringly and repeat the last words that have been taken down. Business dictation is often jerky—given at whirlwind speed for a paragraph or two and at a snail's pace for a sentence or so, with pauses and silences interspersed with mumbles as the dictator gathers his thoughts. The secretary should remember that an employer much prefers that she get complete notes, interrupting if necessary, rather than to leave his desk with words or phrases missing.

The second exception is when the dictator repeatedly uses a conspicuous word. If "elaborate" was used a sentence or two back, the secretary mentions casually when it is repeated, "We just used 'elaborate.'" The employer can then select a synonym. When the secretary does not discover the repeated word until she transcribes her notes, then she should select a synonym if she is certain that her employer would want her to make the change without consulting him.

The possible third exception to the no-interruption rule depends upon the employer's personal preference. Some employers prefer to be interrupted with questions about the context of the dictation at the end of each item instead of waiting until all of the dictation is given. Others prefer that the points in question be discussed one by one later. An employer's face quickly mirrors his annoyance if he dislikes being interrupted with such questions during dictation.

The secretary should never look at the dictator critically while he is deep in thought. It is disconcerting. She should never supply a word for him unless he asks, and she should not interrupt him while he is groping to give expression to his thoughts.

INSERTIONS Again and again a word, a phrase, a clause, a sentence, or a paragraph must be inserted in the shorthand notes. If the insertion is short, it may be indicated with a caret (∧); and the insertion may be made between the regular lines of shorthand just as it would be in longhand. A long insertion should not be squeezed in between lines, however, because such notes do not lend themselves to easy reading. Instead, "Insert A, four pages back" is written in longhand just before the insertion. A bar or other conspicuous signal is used to indicate the end of the insertion. Finally the secretary goes back and writes "Insert A here" where it is to be inserted. If there are a number of such insertions, dictated out of order, she must be very careful not to use the same indicating letter twice.

If the dictator is in the habit of making numerous insertions and changes during dictation, the secretary may wish to leave the entire right half of the notebook page for corrections.

Full identification of material to be copied should be written into the notes. For instance, the employer may say while dictating a report, "Then copy the first two paragraphs from page 71 of the March issue of *Fortune*." The incomplete note "Copy from Fortune" would be of little help during transcription. The note should read, "Copy 1st 2 ¶'s, p. 71, Mar. Fortune."

CHANGES OF THOUGHT The secretary must acquire the ability to recognize changes of thought during dictation. Many men dictate a sentence and, after a long pause, begin again. The secretary must watch carefully to determine whether it is a new thought or a rephrasing to be used in place of part of her notes. A dictator who habitually rephrases is a great trial and worry to an inexperienced secretary, but many dictators do so because they are striving for better, clearer expression. The secretary should be tolerant and sympathetic—not impatient or annoyed, or at least not show such impatience or annoyance. The secretary who must also dictate appreciates the difficulty. Some men when making a change say, "Cross that out," usually not mentioning where to begin. Others say "Correction" and then begin to rephrase, but many men expect the secretary to catch such changes. Sometimes the dictation is so rapid that the secretary cannot locate the material to be deleted or make the desired corrections at the time of dictation. Probably the best method of handling this situation is to indicate with a wavy line the point at which the recorded notes are superseded by instructions about desired changes and to record verbatim the instructions.

DICTATION ETIQUETTE During the dictation period the secretary observes certain rules of office etiquette. One is to avoid receiving personal telephone calls. Either the telephone operator or an assistant takes the calls and explains that the secretary is busy. If a call does come in to the secretary while she is at the employer's desk, she should explain to the caller immediately that she is taking dictation and will call back later.

The secretary's chair is placed conveniently for the employer, not for the secretary. It may be across the desk from the dictator, it may be at the end of the desk, or it may be at the desk

slide. If he has a tendency to pace the floor while dictating, the secretary avoids fencing him in. If his enunciation is indistinct, the secretary tries to be in a position where it is possible to read his lips.

Occasionally, hurried dictation is given to the secretary while she is standing or working at a desk where there is no cleared space. At times it is even necessary to take notes on scratch paper. The secretary should practice taking dictation with a notebook on her knee or while standing, using unruled paper in order to become accustomed to the awkwardness of rush work. The idea is to get it done quickly and without fuss or commotion.

Some employers start talking the minute the secretary enters the door. If the employer is that kind, the secretary should walk in with notebook open and take notes while walking toward his desk.

Another rule is to avoid mannerisms that make one appear uninterested or lackadaisical, such as sprawling out in the chair, gazing into space, pushing the cuticle back on fingernails, or drawing designs on a page. One should not seem impatient or restless as evidenced by the repeated clearing of the throat, the swinging of a foot, or the tapping of a pencil. One employer who dictated very deliberately had many pauses of a minute or two. His secretary decided one day to utilize these minutes by cleaning her ring with a pin. She worked on it carefully for several moments and finally dropped it. The employer said pointedly, "I've been waiting for that to happen," and then he resumed dictation.

To take dictation for an hour or more and remain bodily quiet requires a lot of self-discipline. The body fairly cries for movement and activity. The secretary should try not to be restless or to squirm. If it becomes too trying, she should ask her employer if she may get a drink of water.

When someone interrupts the employer while he is dictating, the secretary uses that time to read notes, improve on the outlines, and insert punctuation. Under no circumstances does a well-bred business person sit there gaping or obviously listening. If the interruption is a personal telephone call or an important visitor for the employer, the secretary should unobtrusively leave his desk or office.

When dictation is resumed, it is a thoughtful gesture for the secretary to read the last sentence dictated, the last paragraph, or the unfinished letter to the employer without waiting to be asked. She should not race as if it were a test of the legibility of her notes. It definitely is not. It is, rather, a test of her ability to read clearly and to phrase logically in order to help the employer get the essence of what he has dictated.

At the end of the dictation the secretary should ask any necessary questions. If something is not clear to her, it probably will not be understandable to the reader later; and this is the time in which to check. The employer would much prefer giving additional information at this point to rejecting a letter later. Before leaving the dictator, the secretary should check to see that she has all the necessary papers for the completion of her work. She should also be sure that she leaves none of her personal belongings on the desk. As she goes, she replaces the *chair in which she has been sitting in the position in which she* found it, and she pushes the desk slide back into position if she pulled it out.

SPECIAL DICTATION Many times a secretary takes dictation over the telephone. To do this properly requires special technique. It is important to be comfortably seated with plenty of space for the notebook and arm movement. The taking of telephone dictation is exactly the same as if the dictator were in the same room, except that the secretary has the use of one hand only and she may have to ask for more phrases to be repeated. Since the dictator cannot see how fast the secretary is writing down the notes, it helps him if she says "Yes" after she has recorded each phrase or sentence. To avoid errors, it is always best to read back to the dictator the entire set of notes.

Occasionally the employer may request the secretary to listen in on a telephone conversation and take notes. Unless she is unusually speedy, she cannot hope to get every word, but she can take down the main points in the same way one takes lecture notes. Such conversation notes should be transcribed at once, since they are but fragments and may lose their meaning and understandability if they are not written out and the gaps filled in while still fresh in the mind.

RECORDING A TELEPHONE CONVERSATION

When the executive wishes to make a record of a telephone conversation, he snaps on the recording device on his telephone and sees that a record is ready on the voice-writing equipment.

A recent innovation in business is the use of a machine for recording both sides of a telephone conversation. The secretary may either transcribe the entire conversation or abstract the important points.

The answers to questions on a printed form are frequently dictated. The employer usually holds the form in his hands so that the information taken will seem sketchy and incomplete. The secretary should be very careful to take the identifying number or letter of each item so that the information can be transcribed on the proper lines. If only one copy of the form is furnished, it may be well to make a carbon copy on a plain sheet and, after it is removed from the typewriter, go back and fill in the correct number or letter for each item on the carbon copy and briefly indicate the question asked.

Dictated matter that is highly confidential should be transcribed as soon as it is possible to do it without taking chances on someone else's seeing it during transcription. The original and

If the secretary is asked to take a letter or a note on the typewriter, she should concentrate on what is being said, not on how fast, slow, confused, or awkward she appears to the dictator. He is probably immersed in the thought of what he is dictating and is not interested in her display of typing skill. The secretary does not stop to erase typing errors as they are made. The errors are corrected or the material is retyped when the page is finished.

MATERIALS FOR DICTATION The recommended shorthand notebook has stiff cardboard covers so that it can be used with any copyholder. It has a spiral binding that permits the pages to lie flat, and the paper is of a quality on which ink will not "feather." A pen is recommended for taking notes, preferably a pen with a point designed for shorthand writing. The ink should flow readily. There should always be a well-sharpened pencil in reserve. At least one colored pencil is needed to make notations that signal the need for special attention to an item. The rubber band for locating the place in the notebook has already been mentioned. A manila folder or two may be helpful for handling materials to be brought from the dictator's desk, and several paper clips may aid in assembling related items.

TECHNICAL VOCABULARY REFERENCE SOURCES

ANTUS, J. J. *Law Office Secretary's Manual.* New York: Prentice-Hall, Inc., 1941, 361 pp.

BREDOW, MIRIAM. *Handbook for the Medical Secretary.* New York: McGraw-Hill Book Company, Inc., 1948, 387 pp.

CONNELLY, EVA L., and MARONEY, THOMAS P. *The Legal Secretary.* New York: The Gregg Publishing Company, 1945, 298 pp.

Hazelton, Queena. *The Aviation Secretary.* New York: McGraw-Hill Book Company, Inc., 1943, 353 pp.

————————. *The Medical and the Surgical Secretary.* New York: McGraw-Hill Book Company, Inc., 1943, 368 pp.

————————. *Secretary to the Engineer.* New York: McGraw-Hill Book Company, Inc., 1943, 309 pp.

MARKWICK, EVANGELINE; ERICKSON, AGNES; and FREEMAN, M. HERBERT. *Office Manual for the Medical Secretary.* New York: The Gregg Publishing Company, 1948, 401 pp.

5. What would you do if you had difficulty in understanding certain words in your employer's dictation? Would you ask him immediately when you fail to recognize the word, at the end of the dictation unit, or would you try to figure it out later by yourself?

6. Are there any circumstances in which the secretary would be justified in correcting an employer's grammar or pronunciation?

7. If your employer was a highly competent technician but found it difficult to dictate good business letters, would you rewrite all of his correspondence? Would you rewrite one or two letters each day and ease into the practice? Would you ask him to give you all the facts and tell him that you will compose the letters?

PROBLEMS

1. The secretary must develop a system for recording office style dictation. Write the following letters in shorthand, paying special attention to ways of indicating the spelling of names, enclosures, changes in thought, special instructions, deletions, and insertions.

(a)

United Dictating Machine Service Company, 208 South High Street, Des Moines 10, Iowa. Gentlemen: This is to confirm our conversation in which we requested (Make that *telephone conversation.*) requested that you call to pick up the Voice-Master dictating unit which you recently delivered to us for trial. We have decided (Go back and insert *during our sales conference* in that last sentence.) We have decided to continue our policy of using the kind (*Using exclusively*) the kind of machine we now have, at least until our new budget is set up. (You may be able to put in a better word than *set up*—doesn't sound very good.) Very truly yours, Harold Kihn, General Manager, Flint Corporation.

(b)

Brown Furniture Company, 1124 Fourth Street, Grand Rapids, Michigan. Gentlemen: We are all ready to move into our new office building as soon as we can get the office furniture (No, change that to *with as little delay as possible.*) Prompt moving, however, depends to a great extent on the delivery of the furniture now on order. (No, change that to *furniture for which you have been awarded the contract.*) We shall appreciate hearing from you soon as to when shipment will be made (No, *when we may expect shipment to be made.*) (No, leave out that whole sentence.) Will you let us know just when to expect this furniture and whether you have been able to cut down the originally estimated delivery period of thirty days. We shall appreciate any co-operation you may be able to give us. Yours very truly (Strike out that last sentence. No, It's all right. Let it stand.) Flint Corporation

(c)

Mr. Harry Coplon (C-o-p-l-o-n), 312 Main Street, Marshalltown, Iowa. Dear Mr. Coplon: I am enclosing a company check for $41.28 in payment of your invoice No. (You will have to look up the invoice number and also verify the amount.) for repairs to the truck driven by our employee, John Wexman (W-E-X-M-A-N). Paragraph. You may consider this an order (Change that to *authorization.*) to make further needed repairs to our equipment as needed. (Send a carbon copy of that letter to Mr. Johnson in our Marshalltown branch.) Yours very truly, Harold Kihn, General Manager, Flint Corporation

2. Think through the following situations and be prepared to explain to the class how you would handle each of them while taking dictation if your employer—

(a) Hands you a letter of application and tells you to acknowledge it, explaining that there are no openings at present but that the application will be considered if such an opening occurs. He wants you to check the references.
(b) Dictates a telegram.
(c) Asks you to arrange an appointment for that afternoon with his superior, Mr. Webster.
(d) Dictates a long letter in the nature of a report. When he finishes, he suggests that you rough it out.
(e) Asks you to insert a paragraph near the beginning of a letter.
(f) Dictates instructions of a general nature about the handling of a newly adopted office routine.
(g) Dictates a word you do not understand.

PROJECTS

A. *Dictation Check Sheet.* One reason that secretaries make errors is that they do not use good techniques in recording dictation. While three members of the class are called to the instructor's desk and given dictation, rate them on the basis of a dictation check list after you have examined their notes. If such a check list is not available, prepare one. Be sure to include supplies, approaching and leaving the dictator, and techniques during dictation.

B. *Taking Office Style Dictation.* Your instructor will dictate a series of four letters in a style commonly used in offices. Keep your shorthand notes for use in Project A of Chapter 6 (page 100).

CHAPTER 6

TRANSCRIPTION TECHNIQUES AND MATERIALS

THE secretary first makes sure that all is in readiness for a period of transcribing. The typewriter keys are clean (and so are the secretary's hands); the ribbon is in good condition; the supply of letterheads, envelopes, and carbon paper is adequate and carefully arranged for a flow of work without waste motion; reference books are within reach; erasers, erasing shields, and cardboard squares for insertion when making erasures are conveniently located; and a pencil is near for editing.

TECHNIQUES IN TRANSCRIPTION

READING, EDITING, AND COMPLETING YOUR NOTES A timesaver and short cut is to glance through the notes on each item before starting to transcribe. This does not mean a word-by-word reading such as the beginning transcriber does, as this is a very laborious process, which should be unnecessary at this stage. The efficient secretary has indicated in her notes during dictation items that must be cleared up before transcription. She has used pauses in the dictation to read and edit her notes in so far as possible. Now she is ready for the final check that precedes the actual transcription process. She scans the notes for signals of what she is to do before starting to type and reads any doubtful items. Then she edits and completes her notes, possibly in red pencil.

To *edit* the notes means:

To insert the proper punctuation.
To decide upon paragraphs if they were not dictated.
To correct errors in grammar.
To make changes in choices of words when advisable.
To rewrite incomplete or senseless sentences.
To rewrite ambiguous phrases or sentences.
To verify data, such as prices, figures, or calculations.
To check the spelling of unfamiliar words.

To *complete* the notes means to jot down, at the beginning or the end of each item, the additional information, such as the

If slight changes are made, the secretary may say when she presents a letter for signature, "I made a few changes; but if you prefer, I shall be glad to retype this."

ORDER OF TRANSCRIPTION The red-penciled notes or the turned-back corners of notebook pages indicate the rush items. As a general rule the telegrams should have attention first. Some employers like to read a telegram before it is sent out; others let the secretary be responsible for its accurate transcription. If the employer does not mention his preference, it is safer to have him check the telegram. The first time, the secretary may casually ask, telegram in hand, "Would you like to read this before I send it out?" His answer will provide the key for her future procedure.

Air-mail and special-delivery letters should be attended to next. If there are notes for one of the employer's assistants, there may be some reason for giving them precedence over the regular mail.

If the employer is a frequent rewriter, the secretary may find it expedient to type a rough draft of the long, important letters and let the employer work over them. A rough draft is an accurate transcription of notes on plain paper, often double or triple spaced to give the writer room for editorial changes. Strikeovers and X-outs are permitted. In fact, most employers consider it time consuming and inefficient for a secretary to take letter care on a rough draft. The furnishing of an unasked-for rough draft requires tact. A plausible, diplomatic explanation is that the secretary made a rough draft of the letter for her own convenience, but she thought the employer might like to scan it before it was put into final typing. Thus, there is no intimation that the secretary expects the employer to make changes; she merely gives him a convenient opportunity if he wishes to take advantage of it.

TRANSCRIPTION ROUTINE One large company has this prominently displayed sign in its central office: "It takes less time to be right than to rewrite." This motto may well be adopted by any secretary. In transcription the establishment of a definite routine does much to help the secretary to "be right." The following steps are recommended:

that *Air Mail* or *Special Delivery* be typed on the letter itself, as well as on the envelope, to call attention to the urgency of the matter. Be careful not to turn two pages of the notebook together and thus omit the transcription of an entire page.

(4) Keep even margins, be careful not to write too low on the page, and follow carefully the rules for end-of-line division of words. If an enclosure is to be included, be sure to indicate that fact. If tabulating an item, such as an address, will aid the reader, by all means block it out from the rest of the letter.

(5) If interrupted during transcription, indicate the stopping place in the notes by a heavy or colored vertical line after the last outline. This is an efficiency habit; otherwise it may be necessary to read through the whole page of notes to find the place again. It is easy to omit lines of notes when the same word or phrase occurs twice on a page if the stopping place is not indicated clearly. If the subject is confidential, cover the face of the letter in the machine at the time of an interruption.

(6) Proofread each page before removing it from the typewriter. Use a ruler to follow the source copy, and point with the left forefinger to the typewritten material as you look back and forth. Check especially carefully the address and any numbers or calculations in the transcribed material. Watch for omissions or repetitions that may have occurred because of interruptions. Although there is a temptation to feel that careful editing precludes the possiblity of errors in grammar or sense, the secretary should proofread mentally as well as visually, for many errors that are hard to find in notes will stand out more clearly when typed and can be detected in the final draft. Being a good proofreader is essential to a superior secretary.

(7) Make erasures carefully on all copies. Move the carriage to the side so that eraser crumbs do not fall into the type basket. Type the corrections lightly, not with a heavy touch.

(8) Be sure that you use the correct signature on the letter. For instance, one letter may be written by your employer in his capacity as sales manager; the next one as a director of

the Executives Club; the third one as chairman of the Finance Committee of the Community Church; and so on.

(9) Prepare or obtain the enclosures required. Attach them to the letter. Do not send out a permanent file copy of a letter or the original copy of a letter that has been received. Typewrite a plain, identified copy instead.

(10) Address an envelope of the proper size; check to see that the address agrees with the one on the letter.

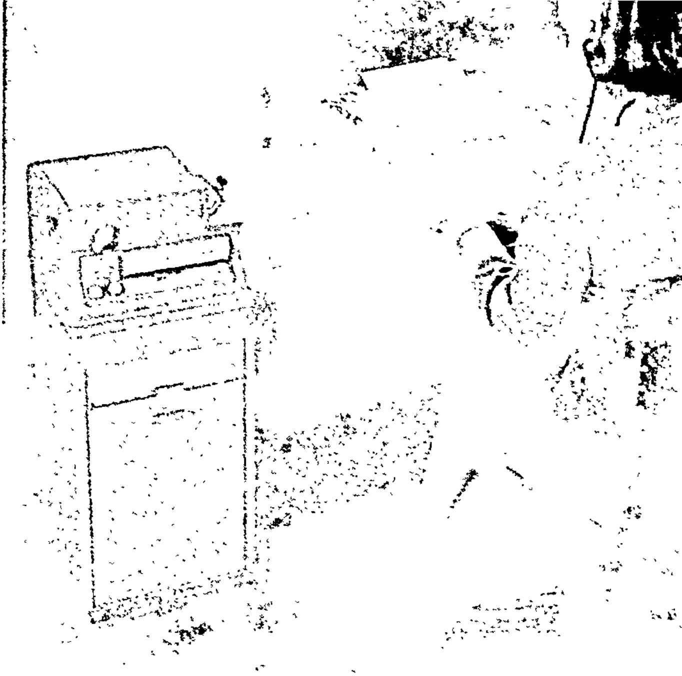
(11) Slip the addressed envelope over the top of the completed letter with attached enclosures. Remove the carbon sheet and leave the carbon copy with the original letter until any necessary corrections have been made. If the employer is at his desk, present the letters for signature face up. If he is away from his desk, turn the top letter face down to prevent curious people from reading it. Some employers prefer to have a special folder or box for unsigned mail. A paper weight is always placed on top in anticipation of a windy moment.

(12) Prepare or obtain material to be sent out under separate cover; get it ready for mailing. If someone else is responsible for preparing the material for shipment, issue complete instructions in writing to the person or department; furnish a typewritten address label. If for any reason the material to be sent under separate cover is not taken care of or arranged for at the time of transcription, attach a note to the face of the letter calling attention to the fact and make a note on the calendar or in the tickler file to check on the matter at the proper time.

(13) Prepare materials for filing. The carbon copy of the transcribed letter may be pinned or stapled to the face of the letter to which it is an answer. Some companies make a practice of placing the carbon copy of the answer on the back of the original letter. If the original letter and its reply are not fastened together, the secretary should write her initials in a prominent place on the incoming letter to indicate that it has been officially released for filing. The secretary often writes in pencil on the face of the typed carbon copy any additional information she believes should be recorded. Such notes are

TRANSCRIBING FROM THE VOICE WRITER

The indicator slip helps the secretary estimate the length of each letter so that she can arrange it attractively on the page.



particularly helpful when two or three sets of correspondence are interrelated and dependent upon one another. The file copies may be placed in a basket until the end of the day.

(14) Run a cancellation line through a page of notes as soon as that page has been transcribed. Some secretaries jot down the date of transcription near the cancellation line if it differs from the dictation date.

TRANSCRIBING FROM VOICE-WRITING MACHINES The dictator may use a voice-writing machine for his dictation; and the secretary may transcribe from the record. These machines are of four types. One type records the dictation on a wax cylinder, which may be shaved and reused more than a hundred times. The cylinder, however, is fragile and not suited for mailing. A second type records the dictation on a plastic disc resembling a phonograph record or on a plastic belt that looks very much like a photograph negative. These recordings are durable and may be mailed to a central transcription pool. Both types are played back on a transcribing unit while the operator types as she listens to the dictation.

A third type of voice-writing machine is the wire recorder, frequently used for recording speeches or programs. The wire recorder is also played back for transcription. A fourth type is the tape recorder, which is very similar to, but somewhat less effective than, the wire recorder.

Transcription is usually performed by starting the record; listening for a few words, a phrase, or a sentence; stopping the record; typewriting the words; starting the record again; listening for a few more words; and so on until each dictated unit has been transcribed. As the operator becomes experienced, she cuts down the pauses between periods of transcribing. The starting and stopping is controlled by a foot pedal, which may also be used to backspace so that the operator can hear may also be used to backspace so that the operator can hear again any part of the record which she did not understand the first time. In case the dictator says something that he did not intend, he may indicate a correction on the indicator slip which is made for each record to signify the point at which each item of dictation begins and ends. By watching the indicator slip, the secretary can determine the correct margins to use for the transcription.

After the secretary has finished the transcription, the recording medium may be prepared for re-use. If it is a wax cylinder, it is placed on a machine that shaves the outer surface and thus prepares it for new dictation. If it is a disc, it may be sent back to the manufacturer for resurfacing at slight cost. The wire recorder can also be used again and again. The secretary should be very sure that material on voice-writing equipment has been transcribed before the records are released for shaving or resurfacing. Otherwise, the dictation may be lost.

Voice-writing equipment can now be used to record both sides of a telephone conversation. It can also be used to record conference proceedings and entire speeches. This type of machine elevates somewhat the function of the secretary. She may be required to abstract only the important points from such recordings, and one of the requirements for the new-type secretary is her ability to pick out the important points from the mass of material included and to summarize them for her employer. Obviously such competency requires intelligence and discrimination.

HELPFUL BOOKS FOR REFERENCE Every secretary's desk should be supplied with a good up-to-date dictionary. Incorrectly spelled words are not detected in proofreading so easily as are typographical errors; spelling must be verified by the use of the dictionary. Consulting the dictionary is not the mark of ignorance on the part of the secretary; it is, in reality, evidence of her thoroughness. The spelling of every doubtful word and end-of-line division should be checked. The dictionary indicates the meaning, derivation, syllabication, pronunciation, and part of speech of a word, and it shows whether the word is written with a hyphen, as two words, or solid. Many errors creep into transcripts because the transcriber does not understand how to use her dictionary. She cannot distinguish between the hyphen and the dictionary symbol used to indicate syllabication; she looks up "advice" but does not read far enough to discover that "advice" is the noun and "advise" is the verb. In transcribing, diacritical marks are added in ink when they must be used. Examples are:

chargé d'affaires, garçon, señor

The secretary should also have easy access to a standard reference book on grammar, punctuation, and construction, such as the *College Handbook of Composition*, by Woolley and Scott; *A Manual of Style*, of the University of Chicago; or the *Style Manual*, of the United States Government Printing Office.

Another source of help to the transcriber is a secretarial handbook, such as the *Standard Handbook for Secretaries*, by Lois Hutchinson; or *The Private Secretary's Manual*, by Bernice Turner; or this book. You will want to keep this text, as it is a valuable reference for the secretary to have at hand, especially the material in the Reference Section. The secretary will find correct spellings of geographical names in the *Official Postal Guide*. She will learn that Pittsburgh in Pennsylvania is spelled with *h*, but that Pittsburg in Kansas does not add the *h*.

Roget's Thesaurus is used by many writers. A thesaurus is a storehouse of words. Many employers who dictate ex-

cellent English and who have interesting choice of words use the *Thesaurus*. The secretary who is unfamiliar with this reference book should learn to use it. Inexpensive editions are available.

Reference books may be furnished by the employer. If not, the secretary will find it a good investment to purchase them herself, making sure they are well indexed. A secretary's mind must be such a storehouse of knowledge about the employer and the business at hand that it is not advisable for her to memorize all of the minor details of acceptable business practices. That is what reference books are for. A secretary need not know the answer to every question, but she must know how or where to find it.

ATTACHING ENCLOSURES Enclosures in the form of checks or currency are paper-clipped to the face of the outgoing letter. Coins are placed in a coin card that may be affixed to a letter by Scotch tape. Stamps may be paper-clipped to a top corner of the letter or glued to the letter by one corner. Business papers and copies of correspondence are attached by paper clips. If the papers are small enough not to cover the body of the letter, they are attached to the face; but if letter sized, they are attached to the back. If an envelope that is to be enclosed must be folded, it should be placed so that a minimum number of folds is required.

A letter should have all of its enclosures appended before it is sent to the employer for signature. Should it be necessary to send a letter in without the enclosures, however, a note is clipped to the top of the letter, listing the ones required. This practice serves a dual purpose—it informs the employer that the enclosures have not been forgotten, and it reminds the secretary to hold the letter until the necessary enclosures are attached.

SUBMITTING MAIL FOR SIGNATURE As a last-minute touch before sending in the mail, the secretary erases any fingermarks and smudges. She carefullly reads all of the correspondence written by assistants and has it corrected before placing it with the other mail to be signed.

A rush letter should be taken to the employer for signing as soon as it has been transcribed. It should then be promptly

put into the mail. The rest of the mail should be submitted together as soon as it is completed. If there is a great deal of mail, however, it may not be possible to get it all transcribed by mail-signing time. In that case all that is finished should be taken to the employer. Some men like to sign the mail that is ready at noon and the rest of it just before closing. The secretary should follow the employer's preference.

The secretary mentally files away for instant use later on the information in the letters turned out each day. A secretarial mind is not a sieve through which activity seeps unnoticed and unremembered. It concentrates on retentiveness.

CHANGES AND CORRECTIONS A frequent point of irritation between employer and secretary is the difference between what the employer thinks he dictated and what the secretary transcribes. A stenographer on her first job almost had the employer tearing his hair over her "That's-what-you-said" habit. On reading a letter to be signed, he would say, "I didn't say this"; and she, bristlingly militant, would answer, "Yes, you did. It is in my notes." Naturally he soon suggested that she answer more tactfully by saying, "I thought that is what you said."

There is only one gracious secretarial way of handling these differences of opinion as to who is at fault. The secretary should take the blame, when she is at fault and when she is not! It really does not make any difference who made the mistake. The important thing is to go about correcting it at once, cheerfully and willingly. If the secretary frowns and is conspicuously resentful at a changed letter, she cannot expect the employer to be pleased with her attitude, for he resents unwillingness even more than stupidity or inability.

Materials for Transcription

The secretary cannot produce attractive transcripts that will suit the purposes for which they are intended unless she understands the materials she uses and can choose those that will best fit her needs. She will want to know about the qualities of paper used in the office, both for letterheads and for copies; carbon paper; envelopes; erasers; and typewriter ribbons. You will want to study this subject matter thoroughly, for a

good workman is never better than his tools. Just a few cautions in the use of office supplies are given here. Problems of buying office supplies are discussed in Chapter 24.

LETTERHEADS

A firm is usually very particular about its letterheads. The typical business office uses white bond paper, with a neatly designed heading, either engraved or printed, to suggest that it is a concern of quality and standing. Such letterheads are expensive and should never be wasted. In most cases the first writing should be usable. One secretary who hired an inexperienced assistant noticed a week or so later that the supply of engraved letterheads was almost gone. That evening she checked the assistant's wastebasket and found forty-five discarded letterheads —one day's carelessness!

A secretary may work for an executive who uses several *different letterheads and who represents several interlocking* organizations. For instance, one company regularly uses seven different letterheads in the execution of its business. It is essential, of course, that the proper letterhead be chosen for each letter.

The stationery for the second and succeeding pages of a letter should be plain, but it should match the letterhead in other respects. Nothing mars the appearance of a two-page letter so much as the use of unmatched stationery. These plain second sheets are also used for reports unless paper of a less expensive quality is supplied.

PAPER FOR CARBON COPIES

Bond paper may be used if only one or two carbon copies are wanted, but thin sheets of strong paper are frequently used for carbon copies. One advantage of using thin paper for carbon copies is that the space in the correspondence file drawer does not fill up so rapidly. Some offices go a step farther in economizing file space and paper by using both sides of the carbon-copy paper when a two-page letter is written. When this is done, the copy on each side is not quite so legible as it is when separate sheets are used; but for all practical purposes the legibility is satisfactory, and the need for fastening two sheets of carbon-copy paper together before filing them is eliminated. Other offices

conserve filing space and insure that the carbon copy is kept with the original by placing the carbon copy of the reply on the back of the original letter.

A special type of carbon-copy paper is the copy sheet. It is a letterhead-size sheet with the word "Copy" printed in large outline letters, usually in red, across the page. Sheets of this type are used when carbon copies of a letter are to be sent out of the office or when a copy must be individually typed. In some offices, plain paper is used for this purpose, and the secretary types the word "Copy" boldly at the top of the sheet. An effective copy indication is made with all caps, typing each letter one line space below and one letter space to the right of the letter preceding it.

Copies of letters that are sent out of the office are usually not signed. The secretary types the signature in the space provided for the pen signature and precedes it with one of the following: (Signed), (s), or S/. Envelopes for copy-sheet communications should be addressed immediately. Such letters should be submitted to the employer with the rest of the mail so that he will know that they have been prepared.

CARBON PAPER A sheet of carbon paper may be used between five and ten times. To determine whether a piece of carbon is still usable, hold it up to the light, carbon side toward you, to see if any light is visible through the sheet. If light shows through it or if the sheet has no shine on it, it is not usable. It should be thrown away or saved for some not-very-particular, single-copy work. Carbon sheets should be carefully kept in a flat box, drawer, or folder when not in use; and any sheet that has become wrinkled should be discarded.

Carbon paper that has been curled at the edges can be straightened to some extent by carefully laying it out flat and weighting it down overnight. A crease in a sheet can be removed by laying the carbon paper face down on a piece of wax paper and pressing the crease out with the finger tips. There is no way, however, to remove "trees" or "veins."

On a long typing job, two economical practices should be employed: first, turn each sheet of carbon paper around every time it is used so that one end of the sheet will alternately be

at the top and at the bottom; second, change the order of the carbon sheets so that the sheet that was used at the bottom of the pack the last time will be used at the top of the pack this time. These practices will result in more uniform wear of the sheets of carbon paper.

If one corner is cut off of each sheet of carbon paper, the carbon paper will fall out when the finished copies are grasped by that corner. There is a carbon sheet that has a scale of lines along the right side so that the typist can see at a glance how many lines are available before she reaches the bottom of the page. Thus she is warned against typing too far down on the sheet.

ENVELOPES

Regular correspondence envelopes are available in a number of different sizes. When a single 8½ x 11-inch letterhead sheet is used for a letter, it is most frequently mailed in a No. 6¾ envelope. If the letter consists of two or more sheets, it is mailed in a No. 10 envelope. Both of these envelopes are oversize so that if the writer wishes to enclose an envelope for a reply, he may do so.

Air-Mail Envelopes. An official air-mail envelope has a red, white, and blue border. This conspicuous identification insures that the letter will get air-mail service when it is handled by postal clerks. If the office is not supplied with printed air-mail envelopes or is temporarily out of stock, the secretary may attach an air-mail sticker to the envelope. When neither the official envelopes nor the stickers are available, the secretary should type VIA AIR MAIL in all caps below the stamp on the face of the envelope.

Special-Delivery Envelopes. The Post Office Department encourages the use of the special-delivery envelope, which has a green and yellow border. Its use guarantees that such letters will get prompt attention at the post office, for they can be picked out of the regular mail instantly. A special-delivery letter in a plain envelope, even though carrying the correct postage and plainly marked as to the service desired, may get mixed in the regular mail and may be given only ordinary first-class mail handling.

Business Reply Envelopes and Cards. Those who solicit business by mail frequently wish to prepay the postage on replies to their letters. Not so many years ago, the only way the sender could prepay replies was to enclose a stamped envelope or postal card in each piece of mail. This was quite an expense since ordinarily few addressees would answer. It is now possible to use for this purpose a business reply envelope or card, either of which can be returned by mail without a stamp affixed. The business firm must secure a permit number from the post office and print this number on the specially designed business reply envelope or card. The regulations concerning these supplies are contained in Section 34.9 of the Postal Laws and Regulations. Air-mail business reply envelopes and cards may also be used.

In these types, postage is collected from the addressee at the time of delivery of the business reply envelopes or cards. The cost of the postage on an ordinary 3-cent letter sent in a business-reply envelope is 4 cents.

Manila Envelopes. Large envelopes of heavy manila stock are used for first-class material too large for the ordinary envelopes and for material sent under separate cover at a rate other than first class. The flap on an envelope of this type is usually gummed so that the envelope may be sealed and sent first class when necessary. Many envelopes of this type have a metal clasp for anchoring the flap. Commonly used sizes are 6½ x 9½ inches, 9 x 12 inches, and 10 x 13 inches.

The larger envelopes of this type are awkward to get into the typewriter. One method is to open the flap, roll the end of it into the typewriter from that end, and type the address so that it is parallel to the flap edge. To have the address running the other direction, when using a standard-width carriage, requires folding the envelope or typing an address label and placing it on the face of the envelope.

Combination Envelopes. A combination envelope is frequently used when the writer desires to send a letter with third-class mail. The letter is sealed in a pocket on the face of a clasp envelope. The other material is enclosed in the envelope proper. First-class postage is attached to the letter pocket and third-class postage, sufficient to cover the inside of the package, is

INTEROFFICE COMMUNICATION

To Mr. C. J. Woods ✓ Date July 5, 195-
Mr. R. R. Graham
Mr. B. E. Neugent
Mr. D. M. Hilmer

Subject Conference on Longman contract

There will be a conference this afternoon at three o'clock in my office to discuss the proposed contract with Longman. Copies of the clauses affecting the operation of your department are attached. Please be prepared to comment upon them.

Signature A. J. Shulton
MVH

INTEROFFICE COMMUNICATION

The secretary made four copies of this interoffice communication (in addition to the file copy) and checked the name of the person to whom each copy was to be delivered. When speed of delivery is not important, she may make only one copy and route it to all persons whose names are listed. When it is undesirable for the reader to know the names of the other persons to whom the message is being sent, the secretary can type the message first and fill in the name of a different addressee on each copy.

Erasing shields are used by expert typists for all typing erasures, on ribbon and carbon copies alike, to protect the rest of the typed matter. One side of the shield should be used for erasing the ribbon typing, which will not offset onto the shield, and the other side for carbon typing, which will offset onto the shield. If both sides are used for carbon-copy erasing, the carbon smears are likely to come off on a good ribbon copy while it is being erased. Shields can be cleaned easily with soap and water.

TYPEWRITER RIBBONS In order to make outstanding transcripts, you will want to watch your ribbon carefully. A ribbon that is too lightly inked decreases legibility and makes a letter unattractive. You should resolve

DISCUSSION QUESTIONS

1. What changes in dictation should the secretary make when she transcribes?

2. What is wrong with the secretary's sentence, "The criteria is reliable"? (Page 82) What lesson can the beginning secretary learn from this example?

3. When the secretary is not supplied with up-to-date reference books, should she ask her employer to purchase them?

4. Do you think that it is fair to the secretary to expect her to take the blame for the employer's errors in dictation?

5. One secretary had the "that's-what-you-said" habit. Frequently as the employer read his mail, he would call in the secretary and say, "Something is wrong here. I didn't dictate it this way." The secretary would rush out for her shorthand notes, find the place, and say, "That *is* what you said because it's just like that in my notes." How would you handle a situation in which the employer denied he made a certain statement?

6. What implied directions would you follow in transcribing from your notes a "personal letter to Jim Haines"?

7. Suppose that the employer finished dictating the first draft of a long report about mid-afternoon on Friday but made no mention of the time when he wanted the transcript of it. You assumed, therefore, that it could be held over until Monday. The employer, however, came to your desk at 4:30 and asked how far along you were with the report and stated that he wanted to take it with him when he left at 5:30 so that he could work on it at home over the week end. What would you do in this situation?

PROBLEMS

1. A good secretary knows what to transcribe first and what to lay aside for a while. Assume that your employer dictated the following items in the sequence given. Indicate the order of transcription by classifying the items into three groups: (a) To be transcribed at once, (b) To be transcribed after rush items, (c) To be transcribed when time permits.

Telegrams
General instructions about office routine
Summary of speech delivered at noon at the Chamber of Commerce luncheon for press release
Interoffice communication in reply to a request for information bringing personnel files up to date
Notes for his personal notebook
Letters in answer to daily correspondence

CHAPTER 7

ARRANGING AND TYPING THE TRANSCRIPT

A SECRETARY who takes pride in her work has a real opportunity to demonstrate superior techniques when she arranges the transcript on the page. By achieving balance and proportion in placement on letterheads and on envelopes, she can prepare materials that represent her employer at his best.

During the transcribing process, too, the secretary has a chance to show her mastery of timesaving techniques in the operation of the tool of her profession, the typewriter. By learning how to use carbon paper efficiently, how to erase both quickly and skillfully, and how to feed cards and envelopes expeditiously, she can increase her efficiency greatly.

Business Letter Style

The Reference Section of this book on pages 591 to 632 provides illustrations of commonly used letter forms, including the simplified letter recommended by the National Office Management Association; a chart describing proper form and arrangement of business letter parts; and illustrations of the correct envelope addresses, including the zone numbers.

BUSINESS LETTER FORMS A definite business letter style may be established by the company or the employer. Some large companies furnish manuals that set up the forms and the rules to be followed on all correspondence. Smaller organizations and one-man offices usually allow the secretaries to follow their personal preference. If you are given *carte blanche,* check up on the details of the style you select. It is so easy to become careless in the details. Be positive that you are following approved forms and placements. Then typewrite a complete model letter and file it in your desk notebook.

THE HIGHLAND LIFE INSURANCE COMPANY

2352 SOUTH JEFFERSON

DAYTON 3. OHIO

November 15, 195-

Mr. Lawrence C. Owens
2352 Elberon Avenue
Dayton 10, Ohio

Dear Mr. Owens:

Do you know exactly what will be your old-age insurance benefits, beginning at age 65, based upon your present income? Few people do. Have you made any provision for keeping a permanent record of the social security taxes deducted from your salary checks? If not, you should take care of this important matter at once.

As a service to our policyholders and friends we have prepared a substantially bound little book especially designed for keeping your social security records. This book also contains in simple language a summary of the provisions of the Social Security Act.

We shall be glad to send you a complimentary copy of the Social Security Personal Record Book, which you will want to keep with your valuable papers. You need only to sign and return the enclosed card.

Sincerely yours,

THE HIGHLAND LIFE INSURANCE COMPANY

D. W. Walker

D. W. Walker, Secretary

JN

Enclosure

LETTER IN MODIFIED BLOCK FORM—MIXED PUNCTUATION

If the attention line is included on the envelope, it may be written as the second line of the address or in the lower left-hand corner. In the former position it may be written in solid capitals. Some offices follow the practice of writing the state, or the city and the state, in solid capitals as that information is used for the first sorting in the post office.

Although a personal or confidential business letter may be so indicated on the letterhead two or three lines above the inside address, it is more common to identify such a letter only on the envelope. If it is the wish of the writer that the envelope be opened only by the addressee, a proper notation is made on the envelope, two lines above the address, or in the lower left-hand corner. It may be underscored for emphasis.

The envelope may carry special instructions to expedite delivery. For example, an *in-care-of* line may help the postman to locate the address. The *in-care-of* line follows the name of the addressee; in other words, it is the second line of the envelope address. It is preferable to write out *In care of* rather than to use *c/o*. The use of ℅ is incorrect.

When trying to reach a traveling person, the secretary should put the notation *Hold for Arrival* or *Please Forward* in the lower left-hand corner of the envelope. When there is a definite future address, such as a hotel where the person will stop four or five days later, she should use the notation *Hold for Arrival.* But if there is a possibility that the letter may reach the hotel after the person has left, she should use *Please Forward.* It is permissible, although not widely practiced, to write a brief note to the hotel clerk on the face of the envelope, such as "Please have this delivered at once."

If an enclosure may be harmed because it is too thick to be run through the stamp cancellation machine at the post office, it is a wise precaution to write *Hand Stamp* conspicuously across the face of the envelope. This may be penwritten or typewritten. Doctors' secretaries sending packets of pills use this protective device.

Typing Tips for the Transcriber

The secretary must be a skilled typist capable of turning out presentable work in a reasonable length of time. She does

not have the time to make repeated rewrites to achieve acceptable results, nor can she afford to rush through a typing job so that the result is peppered with conspicuous corrections. She must acquire facility in the techniques of typewriting as practiced in the business world.

STROKING AND TIMING The secretary should have a consistently even typing stroke so that all letters are uniformly dark and sharp and clear. Uneven, jerky typing strokes result in unattractive copy. A page should not present a variegated or mottled appearance caused by a mixture of light and heavy letters.

The timing should be rhythmic. If it is not, decrease your speed until you can control the rhythm. Automatic typing, however, is not in perfect rhythm. The typing of common short words, such as "the," "and," "it," is so habitual that you could probably type any one of them in the same time it would take to type the letter "q."

A typing fault that results in very unsightly work is that of poorly timed stroking of the shift key. Raised capitals are caused by not having the shift key all the way down when you strike the letter key, or by having begun to release the shift key before the letter is struck.

Effect When Capital Letter Is Struck Before Shift Key Has Been Fully Depressed

If lower-case letters following capitals drop below the line of writing, the lower-case letters have been struck before the shift key has been fully released.

Effect When Lower-Case Letter Is Struck Before Shift Key Has Been Fully Released

If your copy is spotted with letters out of line, take a little time to practice the timing of the shift key on your typewriter.

Unnecessary spaces between letters or words may be caused by a faltering or uneven stroke or by a stroke that is too hard.

When a machine becomes clogged with erasure particles or dust, it may skip spaces. The only remedy for this is a good cleaning of the typewriter. Extra spaces may also be caused by alternating thumb spacing. All spacing should be done with the right thumb.

Some typewriters are adjusted to react to the slightest touch in order to adapt them to speed typing. A typist who does not use the staccato touch will have a difficult time because of skipped spaces on such a machine. She holds to a key or a space bar just long enough for the machine to jump a space. The remedy is to change one's speed and stroking or to have a repairman adjust the machine.

CARBON COPY WORK Carbon copies are required for two purposes: (1) to provide records that are kept in the permanent files and (2) to distribute copies to others who are interested in the subject matter. Since a file copy is required of every piece of outgoing correspondence, one carbon copy is always made. Additional copies are made when it is advisable to inform others of action taken. For example, when a home office answers an inquiry, one carbon copy of the reply may be sent to the branch office concerned and perhaps another to the salesman who works in that territory.

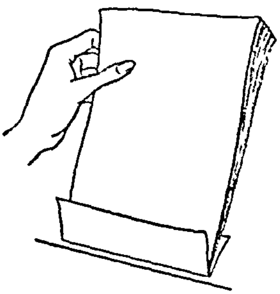
For work other than correspondence, copies may or may not be required. Whenever in doubt, however, the secretary should make a carbon copy. It takes less time to destroy an unwanted copy than to type another.

Assembling a Carbon Pack. It is a simple matter to assemble paper for a letter that is to have only one carbon copy. Carefully place the carbon sheet on top of the carbon-copy paper and put the letterhead on top. Pick up the set of sheets with the shiny side of the carbon paper toward you and the printed letterhead at the bottom edge; then square the corners by loosely dashing the set of sheets on the desk so that they will be ready for insertion into the typewriter.

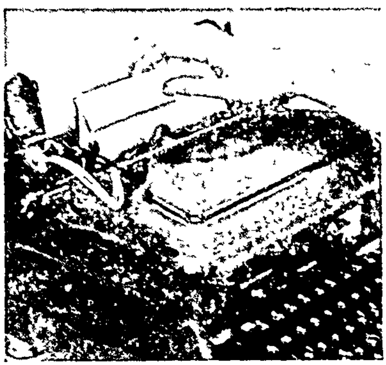
When five or six or more copies must be made, however, the assembling of the carbon pack is a more meticulous, timetaking task. First, lay out the bottom sheet of typing paper. Grasp a piece of carbon paper by the two top corners and lay it

carefully on the paper, keeping the corners squared. Repeat until the entire set of sheets is made up. Then, holding the sheets loosely by the sides, dash the bottom edge of the pack on the desk to line up the edges.

Inserting the Carbon Pack into the Typewriter. When only one or two carbon copies are needed, the pack can be inserted into the typewriter without difficulty. For heavier packs, however, the insertion is simplified by the use of a *leader.* This is a long, narrow, folded strip of paper, which is placed over the top of the assembled sheets before the pack is inserted. The fold of the leader is more easily gripped by the feed rollers than the separate edges of the numerous sheets in the pack. Insert the pack with a quick turn of the platen and roll it up far enough to remove the leader. Before beginning to type, operate the paper release lever to release the pressure on the sheets, thus reducing the possibility of creasing the carbon paper.



L. C. Smith & Corona Typewriters, Inc.



Remington Rand

INSERTING A CARBON PACK BY USING A LEADER

Another way to handle a difficult feed is to roll a piece of letter-size paper around the platen until only about an inch of the bottom of the sheet is free. Insert the carbon pack between the open flap of the paper and the platen and roll the pack into typing position. Leave the sheet of paper on the platen until you remove the typed pages.

Turn the platen as little as possible when typing a multiple-copy pack to avoid "treed" or "veined" carbon paper. If the carbon paper tends to wrinkle as the pack is rolled forward,

gether with a paper clip because the clips will leave marks on the pages. The proper procedure is to remove the sheets of carbon paper carefully and lay the typed sheets unclipped and face down on a plain sheet of paper so that the original copy will not become soiled.

Proofreading or reading back should be done while each set of pages is intact so that necessary corrections for one page can be made on the entire set of copies. It is much more difficult and timeconsuming to extract the proper pages from assembled sets for corrections.

To assemble the pages into sets, lay out the copies of the last page face up across the top of the desk or table. Then lay on the copies of the next-to-last page, and so on until all pages have been distributed, being sure during this process to place all original copies in one stack, all first carbon copies in another, and so on. Each set must be checked for proper sequence of page numbers so that any errors in the assembling process can be detected and corrected.

Special Carbon-Copy Work. To make notations on carbon copies that are not to appear on the original, insert a blank piece of paper between the ribbon guide and the original copy. Type the notation on this piece of paper, and it will appear only on the carbon copies.

Red ink is used for indicating losses or decreases on financial statements or to give emphasis to part of the text. The red part of a black and red ribbon, or red carbon paper, or both may be used. The black part of the copy is typed first, leaving blank spaces where the red copy is to be inserted. Type about three inches of the text at a time, leaving space for the red parts to be filled in. Turn the paper forward slightly and place a small piece of red carbon behind each black carbon in the proper location. Roll the pages back into position. If the ribbon is all black, place a small piece of red carbon under the card holder of the typewriter and type in the red figures or words. Then remove all of the red slips.

If there is a considerable amount of copy to be inserted in red, it is best to keep your pages clipped together in each upper corner. Insert the black carbon sheets so that they extend beyond the pages at the bottom. When all black typing is com-

(5) Place the erasing shield carefully over the part to be erased so that letters near the error will not be affected by the erasure.

(6) Use a soft or pencil eraser first to remove the excess ink; then complete the job with an abrasive or ink eraser.

(7) Erase with light strokes. When one is irritated at making a mistake, it is natural to want to make a vicious erasure, venting one's displeasure on the paper. The usual result then is an unattractive rough spot or a hole erased through the sheet of paper.

(8) Blow or brush the erasure particles away from the machine.

(9) If necessary, smooth the edges of the roughened spot with the back of your thumb nail.

On a ribbon copy a letter or a part of a letter may be removed with a razor blade or sharp knife blade by lightly scraping the ink away. To change an *h* to an *n*, for example, merely scrape off the upper portion of the *h*. A comma, likewise, can easily be changed to a period.

Erasing on Carbon Copies. For erasures on carbon copies while they are in the typewriter, use a small card behind the sheet being erased and in front of the next carbon sheet. The weight of the card must be sufficient to prevent the erasing pressure from going through to the carbon copies behind it. One advantage of this method is that the card remains clean because it does not come in contact with the carbon coating, and another is that there is little danger of letting such a card remain in the sheets when typing is recommenced. Some secretaries prefer to use small slips of paper or several lightweight cards, however, placing one behind each sheet of carbon paper.

To make the erasure on a carbon copy, move the carriage over to one side and carefully put the erasing shield in position. Use a soft pencil eraser. Erase the error on the top carbon copy first and remove the slip or card. Then proceed to the next carbon copy.

When all copies have been erased, the correction should be typed in lightly with no more force than has been used on the

When the word to be typed as a correction requires one less space than provided by the error, each letter should be allowed slightly more than one space. This can be done by striking the space bar after each letter is typed and then depressing the backspacer slightly and holding it in that position while striking the next letter. Another way of typing this kind of correction is to leave two spaces either before or after the word that is typed as a correction. Compare the results secured by these two methods in the following illustration.

```
When you return, he may leave.
When  you return, he may leave.
```

When no space has been allowed between two words, erase the last letter of the first word and the first letter of the second word. Then retype those letters so as to leave space between the words. When a letter has been omitted at the end of a word, a similar procedure may be followed, involving in this case, of course, only the erasure of the first letter of the following word

```
When you return, he may leave.
```

When a "thin" letter such as *l*, *i*, or *t* has been omitted from a word, it may usually be inserted satisfactorily without erasing. Use the following procedure:

(1) Set the carriage at the first letter beyond the omitted stroke.

(2) Push the backspace key down part way. Steady the key by bracing your hand against the machine frame, if necessary.

(3) When the printing point is halfway between letters, strike the omitted letter.

```
infallible
```

Sometimes it is necessary to make an insertion between lines. This is not often done in correspondence; however, there are employers who prefer such an interlined insertion in a

routine letter to the cost and time of retyping it. To make this type of insertion, strike the diagonal key (/) in the space where the insertion is to be made. Center the insertion over the diagonal mark.

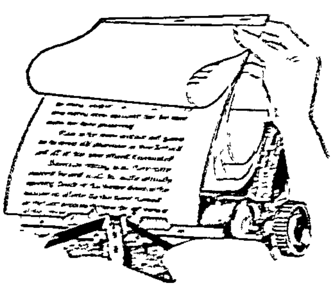
```
When time is the essence,
               are
     insertions/acceptable.
```

The correction of an error by a strikeover is usually frowned upon, but certain inconspicuous strikeovers are permissible in most typewritten work in the office. The following strikeovers are difficult to detect in most cases, especially on carbon copies:

b over o	E over F
d over c or o	Q over O
h over n	, or ; over .
o over c	: or ? over .

Other Suggestions. A short cut in making the same correction on separate pages is to insert all copies without the carbon paper into the typewriter at once. After correcting the top sheet, operate the paper release and remove the corrected sheet. The second sheet will then be in approximate position for its correction.

If you wish to make a carbon correction on a carbon copy, hold a small piece of carbon paper directly over the spot where the correction is to be typed. Adjust the force of your stroke to the intensity of the color of the typing on the carbon copy.



Correcting Page of Bound Report

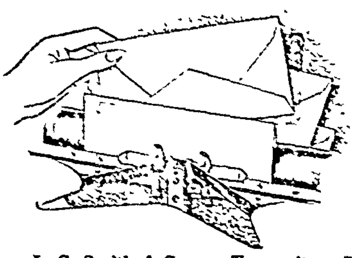
Pages of a report or manuscript that are bound at the top can be corrected without unbinding. Feed a blank sheet of paper into the machine in the usual way until the paper shows about a two-inch top margin. Insert the bottom of the sheet to be corrected between the top edge of the paper and the cylinder. Reverse the platen to the desired point for typing and make the correction.

The secretary must frequently decide whether it is better to erase and correct or to retype. Most employers prefer that the work be retyped if there is little or no difference in the amount of time required.

DEVICES OF THE EXPERT TYPIST Those who typewrite day after day have perfected many tricks of the trade, some of which the secretary should adopt. She will find them short cuts to the efficiency toward which she is always aiming. It will pay you to experiment with these devices and practice them until you handle them skillfully. You may not be called upon to perform them often, but you should be able to use them when required.

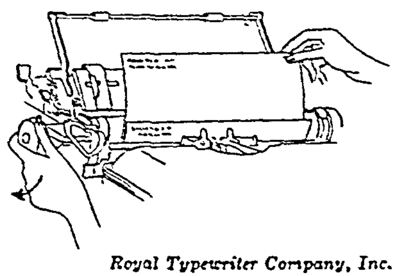
Chain Feeding Envelopes. When you have a number of envelopes to address, you can save time by chain feeding them. Feed the first envelope until only about one-half inch of the bottom of the envelope is free. Then place the top of the second envelope between the platen and the bottom of the first envelope. As you turn the platen to remove the first envelope, feed the third envelope into the typewriter in the same way that the second was handled.

Stack the plain envelopes on the left of the typewriter, flaps down and bottom edges of the envelopes toward you. Insert each envelope with the left hand. Operate the right cylinder knob with the right hand. When the envelope in typewriting position has been addressed, turn the platen to remove the envelope and at the same time pick up the next envelope with your left hand and feed it into the cylinder. Remove the addressed envelope with the right hand and stack it face down to the right of your machine.



L. C. Smith & Corona Typewriters, Inc.

CHAIN FEEDING ENVELOPES

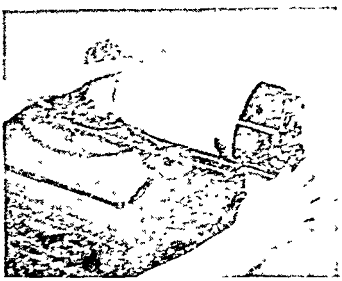


Royal Typewriter Company, Inc.

BACK FEEDING ENVELOPES

Some typists prefer to chain feed envelopes by back feeding them. To perform this operation, insert the second envelope behind the top of the one that you have just typed. Then turn the platen backwards to place the second envelope into typewriting position. When this procedure is followed, it is not necessary to remove each envelope as it is completed. The envelopes will stack themselves in proper order for sealing and stamping against the paper table.

Back Feeding Small Cards. It takes much less time to back feed small cards from the front of the typewriter. Crease a pleat about a half inch deep across a sheet of paper to form a pocket for the card. Paste or tape the pleat at the sides of the sheet to hold the pleat in place. Feed the pleated sheet into the machine until the pleat is visible just above the alignment scale. Drop the first card into the pleat and turn the platen backward to put the card in position for typing. Draw a line in pencil on the sheet along the left edge of the card to serve as a guide in fixing the position of other cards. The large sheet, which is gripped by the feed rolls, holds the cards steady. This procedure increases speed of feeding because only a partial turn of the platen is required. For large cards chain feeding is recommended.



Remington Rand

BACK FEEDING SMALL CARDS

Fill-ins. The term "fill-in" refers to the insertion of some typed material in a space provided on duplicated or printed letters, bulletins, or business papers. The fill-in may be an address, a salutation, a word, phrases, or figures. On interoffice correspondence no attempt is made to disguise fill-ins, but on outgoing mail they usually should match the body of the message. The procedure is as follows:

(1) Use a ribbon that matches the body of the message in darkness of color.

(2) Set the carriage in position to insert the fill-in. Test the position by typing over a period or comma in the text.

(3) When the position has been determined, set the paper guide and margins for use in succeeding fill-ins.

(4) Salutations and addresses are placed more accurately if the lines are typed from bottom to top. To do this, set the machine at the first line of the body of the letter. Turn back the platen two lines and type in the salutation. Turn back the platen two more lines and type in the last line of the address. Turn back the platen one more line and type in the next to last line of the address, etc. This system assures exact placement and is followed on important work.

This method should be followed until the eye is adept at selecting the approximate spot to begin the address and then the secretary can make the fill-in in the usual top-to-bottom sequence.

Centering. Undoubtedly you have centered copy on 8½ by 11-inch paper so often that you can do it accurately without giving much thought to it. In secretarial work, however, you probably will use paper of other sizes. You should know how to find the exact center of the page upon which you are typing regardless of its width.

The simplest way of determining the exact center of a page is to fold the paper vertically and to crease it very lightly in the middle. For some types of work, however, this may spoil the appearance of the finished copy. In that case one of the following methods may be used:

(1) Set the paper guide at exactly zero on the platen scale. Note the number on the scale at the right edge of the paper. Divide that number by 2, which gives half the width. Move the carriage to that number and that will be the center of the paper. Example: If the left edge is on zero and the right edge is on 85, then 85 divided by 2 gives half the width, or approximately 42, which will then be the center point on the paper.

(2) Measure with a ruler, lightly marking the halfway point with a pencil and moving the carriage to that center mark.

(3) Draw a heavy black center line vertically down a sheet of paper to use as a backing sheet for the original sheet. The

black line will show through the paper and indicate the center all the way down the page.

To determine the center of the available typing space, subtract the numbers at which the left and right margin stops are set and divide by 2. Thus, if the left margin stop is at 20 and the right at 68, the difference is 48 and the exact center of the typing space is 24 spaces beyond the left margin, or at 44.

After determining the center of the page or typing space, set a tabulator stop at that position. Then you need only depress the tabulator key to center if you keep the paper guide stationary.

Centering Headings. To center headings, set the carriage at the exact center of the typing space. Backspace one space for each two characters and spaces in the heading. It is not necessary to count the strokes in the heading if you say the letters and spaces to yourself two at a time as you are backspacing. For example, to center the heading "Postal Cards," set the carriage at exact center of the typing space. Backspace once as you say *p o*, backspace again as you say *s t*, again for *a l*, again for *space c*, again for *a r*, and again for *d s*. This gives the exact typing position for the beginning letter of the first word of the heading.

If double-spaced lettering in the heading is desired, backspace one space for each letter in the heading.

If you prefer, count the number of letters and spaces (total strokes) in the line to be centered and divide the number by 2. Set the carriage at the center and backspace the correct number of times. This gives you half the total spaces of the heading to the left, and the other half will naturally fall into position on the right. A quicker way is to subtract the number of strokes for half the title from the center point, move the carriage to that point, and begin typing.

Estimating Word Count. For manuscript or report typing, keep the pages uniform in length and the margins uniform in width throughout. This not only adds to the attractiveness of the copy but also simplifies making an estimate of the word count. You can maintain uniform bottom margins by marking each page lightly in pencil at the stopping point or by using

micrometric carbon paper. You will erase these marks, of course, when you remove your copy from the typewriter.

There is an average of 12 words to a line of approximately 60 pica spaces. The average is 14 words to a line of approximately 72 elite spaces. Double spacing on an 8½ x 11-inch page permits approximately 26 lines to a page. This gives a total of approximately 312 words a page with pica type and 364 words with elite type. Short lines and paragraph indentions will probably decrease the count to approximately 300 and 350 words respectively.

To compute the approximate number of typed words on any page, average the number of words per line by adding together the number of words in any five lines and divide by five. Then multiply this average number of words a line by the total number of lines on the page.

Even Right Margins. Typewritten matter is sometimes set up in columns in newspaper or magazine style with a uniform right margin. When this result is desired, it is necessary that the copy be typed twice, first to determine the number of extra spaces, if any, in each line, and second to type the lines with the extra spaces distributed between words. In the first typing the number of extra spaces in each line can be determined easily by completing the line with some easy-to-count character that does not require the use of the shift key, such as the diagonal or a small *x*. In the second typing care should be exercised in distributing extra spaces so that not all of those in a number of consecutive lines will appear on one side of the column. The correct procedure is indicated by the following illustration and the one on page 120:

    As the secretary becomes more and/
more accustomed to her position, she
will be able to anticipate many of//
the things that should be done; she/
should, then, proceed to get them///
done without any specific instruc-//
tions.

First Copy for Determining Extra Spaces

As the secretary becomes more and more accustomed to her position, she will be able to anticipate many of the things that should be done; she should, then, proceed to get them done without any specific instructions.

FINAL COPY WITH EVEN RIGHT MARGIN

A device called the *Marginator* can be attached to any typewriter to vary the spaces between letters so that an even right margin may be maintained. Probably, at some time in the future typewriters will be available with some such device as standard equipment.

REFERENCE READINGS

Business Ideas Handbook. New York: Prentice-Hall, Inc., 1949, pp. 84–110.

National Office Management Association. *Manual of Practical Office Short Cuts.* New York: McGraw-Hill Book Company, Inc., 1947, pp. 256–265.

WANOUS, S. J., and ERICKSON, L. W. *The Secretary's Book.* New York: The Ronald Press Company, 1948, pp. 20–56, 345–358.

QUESTIONS ON READINGS

1. What is included in the Reference Section of this book?

2. Give directions for writing three- and four-line envelope addresses.

3. Where are the following special notations placed: *Personal, In Care Of, Please Forward,* and *Hold For Arrival?*

4. What causes (a) light letters throughout copy, (b) flying capitals, (c) punctured holes in paper, (d) skipped spaces, (e) shadow letters, (f) piled letters? On the electric typewriter what causes extra letters that you did not consciously strike?

5. How can an envelope be used as a leader for a thick carbon pack?

6. If marginal stops are set at 15 and 90 on an elite machine, how many spaces are available for typing? What is the center

of the available typing space? How would you set margins for a 70-space line on an elite machine? How would you set margins for a 60-space line on a pica machine? How would you set margins for a six-inch line on a pica machine?

7. Assume that your firm is sending out a mailing to 1,000 customers and that business reply envelopes are enclosed. (The postage on a business reply envelope is 4 cents.)

(a) Would it have been less expensive to have enclosed stamped envelopes if replies were received from 10 per cent of the customers? 35 per cent? 65 per cent? 80 per cent?

(b) How large a return would be necessary to make it less expensive to use stamped envelopes?

8. How would you address an envelope to the employer in each of the following cases:

(a) He is staying at a seaside summer resort in a cottage rented from Mr. E. B. Snyder.

(b) He is making a two weeks' tour of one of the sales territories. You have three hotel addresses for him for the two weeks.

(c) He is to present a report that you are sending him at a conference being held in a hotel where he is not registered.

DISCUSSION QUESTIONS

1. Which method of feeding your carbon pack into the typewriter do you prefer? Why?

2. Under what circumstances would you retype all of the copy on the page in case of error rather than erasing and correcting the error? In what cases would you erase and correct the error rather than retype all of the copy on the page?

3. Which method of chain feeding envelopes do you prefer? Why?

4. Do you think that the National Office Management Association letter (See page 593) will gain wide acceptance? Why?

5. Under what circumstances do you think that a letterhead rather than an interoffice memorandum would be used for a communication to another executive in the same building?

6. Do you think that the secretary should ever strikeover in transcribing?

PROBLEMS

One's efficiency depends upon knowing what to do and how to do it. In the following problems you will be given an opportunity to apply both knowledge and manipulative skill to typewriting situations.

1. As secretary to Mr. James R. Johnson, general manager of Forester, Inc., type the reference lines and enclosure identifications as you think they should be written in the following situations:

	Signature Data	*Enclosures and Mailing Notations*
(a)	Only Mr. Johnson's title is typed under his pen-written signature.	Insurance bill and a check in payment.
(b)	Both his name and title are typed under his signature.	Contract of sale and an affidavit.
(c)	R. A. Jones dictated the letter for Mr. Johnson's signature, and Mr. Johnson's name is not typed under this signature.	A copy of a letter and a carbon copy to Mr. R. A. Jones.
(d)	Same as Situation "C," but Mr. Johnson's name is typed under the signature.	Catalog to be mailed under separate cover. Letter sent by air mail.

2. Practice each of the following techniques for handling a heavy carbon pack so that you can demonstrate any one of them before your group.

(a) Assembling the carbon pack (original and four carbons) for page 1 of a letter or report.
(b) Inserting the carbon pack into the typewriter, using the type of leader that you find most satisfactory.
(c) Removing the carbon pack from the typewriter and separating the sheets of paper.
(d) Assembling the carbon pack for page 2 of the same job, using the same sheets of carbon paper that were used for page 1
(e) Inserting the carbon pack into the typewriter.

3. Practice each of the techniques for special kinds of corrections until you can make the corrections expertly without taking too much time. Then, make the following corrections on one sheet of 8½ by 11-inch paper, making two carbon copies.

(a) Type an exact copy of the following sentence. Then, erase the word *your* and type in its place the word *their*.

    We received your letter of August 3 today.

(b) Type an exact copy of the following sentence. Then, erase the word *thirty* and type in its place the word *sixty*.

    Your account is thirty days past due.

(c) Type an exact copy of the following sentence. Then, erase and retype as little as necessary to allow a space between the words *for* and *the.*

Our expenses forthe year have increased 5 per cent.

(d) Type an exact copy of the following sentence. Then, insert the letter *l* in the word *following* without erasing.

The folowing is a summary of our sales for June.

(e) Type an exact copy of the following sentence. Then, add the letter *i* to the word *issued.*

During the year, 154 shares of preferred stock were ssued.

4. Type the first three paragraphs on page 102, using a three-inch line and an even right margin. Submit both copies of your work, the first to indicate how you determined the extra spaces in each line that had to be distributed between the words of the line, and the second to show how you distributed these extra spaces.

5. Practice each of the following typing techniques until you feel qualified to demonstrate any one of them before the class.

(a) Chain feeding envelopes
(b) Back feeding envelopes
(c) Back feeding small cards
(d) Chain feeding large cards
(e) Typing a rush item on a half sheet without removing the copy that is in the typewriter

6. Using eight plain envelopes of the same size, address them in block form for the following mailing list. You need not type a return address.

(a) John Stanton, Pine Bluff, Ga.
(b) Marvin Shutte, Sales Manager, Tryon Mills, Pine Bluff, Ga.
(c) Albert Neville, Hotel Washington, Chicago 6 (Mr. Neville will be there five days from today.)
(d) W. Clay Miller, care of Mrs. Leonard Miller, 18 Hawkins Drive, Alton, Illinois
(e) A personal letter to R. P. Mack, a Thomas Lytle representative, in care of American Mutual Company, Cass Building, Detroit 11, Michigan
(f) A special-delivery letter to the attention of R. M. Enwright, Dewitt Advertising Agency, 2119 Empire Street, New York 19.

(g) An air-mail letter to Ralph M. Taylor, President, National Grocers Association, who is attending its convention at the Adolphus Hotel, Dallas 2, Texas. The letter should be delivered to him as soon as it reaches the hotel.

(h) You are trying to reach a traveling man, Wylie Kilpatrick, whose last address (yesterday) was the Daniel Boone Hotel, Charleston 2, West Virginia.

PROJECT

A. Comparing Letter Styles. Mr. Simpson, your employer, is considering the adoption of a uniform letter style to be used throughout the company (home office and branches). In adopting a uniform letter style, he will consider not only appearance but also economy of time in typing. In order that both factors may be checked, he asks you to type a letter following various letter styles and to make a recommendation as to which style you prefer, with advantages and disadvantages.

To carry out this instruction, type on the letterheads of Continental Products the letter on page 103 according to each of the following styles:

(1) Modified block style with indented paragraphs—mixed punctuation
(2) Full block style—open punctuation
(3) Inverted paragraph style—mixed punctuation
(4) Indented style—close punctuation
(5) Modified block style with blocked paragraphs—mixed punctuation
(6) National Office Management Association recommendation

Considering both appearance and economy of operation, select the letter style you would recommend. Attach your recommendation, with your reasons, to the packet of letters before you submit them to your instructor. (See pages 592 and 593 for illustrations of these styles.)

CHAPTER 8

COMPOSING BUSINESS LETTERS

THE first time the employer says, "Will you answer this letter for me?" you can be assured he has reached the point of having confidence in you. His request will imply several subtle compliments—that you have a good background in English, that you have a good vocabulary, and that you have proved yourself to be accurate. He does not know if you have any skill in composing a good business letter. Your first attempts will establish proof of that. Your skill will be evident if you have retained and made use of the principles of effective business writing and if you have absorbed the salient points of his style of writing.

ROUTINE LETTERS A high percentage of business letters are routine. Letters are written for many purposes: to complete records, such as acknowledgments and covering letters; to make simple requests, such as for reservations or information; to serve as notices of meetings or conferences; to serve as reminders, such as follow-up letters. Letters of these kinds are concise statements of fact or courteously worded questions. Because of their simplicity and brevity they are the first ones usually turned over to a new secretary. They are just as important in many respects as long, involved letters, however; and a secretary who can handle such letters will save her employer an appreciable amount of dictating time.

Acknowledgments. Generally speaking, every letter should be *answered* or *acknowledged* promptly, preferably on the same day that it is received. In *answering* a letter, one discusses the points raised. In *acknowledging* a letter, one merely records receipt of it and adds any other necessary information. A good letter of acknowledgment is courteous and complete, and it sounds personal. It should not sound like an apathetic form letter full of trite or hackneyed phrases.

The word "acknowledge" should be avoided. The use of this word is acceptable, but one becomes weary of the pair "acknowledge receipt." This combination has been used so much that it sounds hackneyed. It is a challenge to the secretary, therefore, to compose an acceptable letter of acknowledgment without including the word itself.

A good letter of acknowledgment has the following characteristics: (1) It specifies the date of the mail being acknowledged, preferably in a subordinate position; (2) it definitely indicates the type of thing being acknowledged; and (3) it includes a personal touch that takes away the crispness of brevity.

Ordinary	Improved
We have received your order of November 18. The merchandise will be shipped as soon as the order is passed by the Credit Department.	Your order of November 18 is very much appreciated. We hope to be able to ship the merchandise early next week. If there should be any unusual delay, we will write you about it promptly.
This will acknowledge receipt of the package of printed letterheads and bill for same. Payment will follow before the tenth of next month.	Our new letterheads, which arrived yesterday, are very attractive. We have turned the bill over to the Accounting Department. It will be paid shortly after the first of the month. Thank you for such prompt delivery.
We acknowledge receipt of your letter of November 19 and thank you for same.	Thank you for your letter of November 19. We appreciate the information you have given us about Mr. Smith's credit record. Please call upon us to reciprocate.
This is to acknowledge receipt of your request of November 20, which will have Mr. Baker's attention upon his return to the office next week.	Mr. Baker, to whom you wrote on November 20, is out of town for a week. He will answer you very shortly after his return.

Covering Letters. A universal business practice is to inform the recipient by letter when money or material is sent to him. Every check or money order and every shipment of materials for which a business form is not prepared should be covered by a letter setting forth all of the details. The letter should tell what is being sent, why, when, and how. The purposes of covering letters are: (1) to tell the addressee that certain material is enclosed or en route so that he will be looking for it and (2) to provide a permanent file record of what is sent and when. The facts should be simply and clearly stated in the letter with a little dash of personal interest if possible.

Ordinary	Improved
Enclosed please find check in the amount of $3.50 for subscription to your magazine for the year beginning December 1, 195–.	Please renew my subscription to your magazine for the year beginning December 1, 195–. My check for $3.50 is attached.
Under separate cover we are sending you a cabinet of blotter samples. When they have served your purpose, will you please return the cabinet as they are difficult to replace.	A convenient cabinet of our full stock of blotter samples was sent to you today by Railway Express. We are glad to lend this to you as long as you have need of it. We hope you will find something among the samples to answer your needs. P.S. Just use the attached return address label when you are ready to send the cabinet back.

Requests and Inquiries. The employer occasionally asks his secretary to write for certain things or information for him. It may be to get a hotel reservation, to get a detailed statement from a creditor, or to get technical information or literature. Every request or inquiry should be phrased courteously and should contain complete information. The following are typical requests and inquiries.

> Please reserve for me a single room with shower for the nights of June 11, 12, and 13 at $6 or less. I shall register around 6:30 p. m. on June 11.

May I have a detailed bill covering my March statement? Thank you very much.

Will you send me your literature on glass bricks. We are hoping to remodel our offices and should like to study the use of your product.

Please do not send a representative to call upon us. The plans are still in the "idea" stage. If we find your product usable, we shall then ask to have him call.

Where can we obtain service locally on our Mason Calculator? There is no agency listed under that name in the classified section of the telephone directory. The keys stick frequently, and we feel that the machine needs the attention of a qualified serviceman.

Can you supply us with a record of charges incurred by our salesman, Mr. J. L. Kubin, at your garage for the year 195–? We need this information for the compilation of his income tax return. Thank you very much for your assistance. We enclose a stamped return envelope for your reply.

Notices. When you are asked to send out notices of a meeting or a conference, you must obtain complete information as to correct name of the group, the date, the time, the place (building and room), the purpose, the special preparations required, and whether a reply indicating probable attendance is necessary.

These notices are straightforward statements of fact. The prime requirement is completeness and accuracy.

Errors in date or time of meeting sometimes cause serious inconvenience, and the secretary should double-check the calendar and the draft of the notice as to the time and the place of the meeting. Notices must answer the questions who, when, where, and why. Many notices request the recipient to make a reservation or to notify some person of his intention or inability to attend. In social correspondence one uses "R.S.V.P." to make this request; in business one states the request specifically; for example, "Please call GRandview 4362 if you cannot attend," or "Please return the attached card before August 31." Double post cards are frequently used—the notice on one card and the information relating to probable attendance on the other.

Two acceptable versions of notices of meeting are given below.

> On Friday, December 1, all Plant 5 foremen will meet for lunch at twelve noon in Private Dining Room A, adjacent to the cafeteria. Mr. Baker will lead a discussion on Absenteeism and will welcome your suggestions. Please telephone this office before eleven Friday morning if you will be unable to attend.

> Mr. Baker will lead a discussion on Absenteeism before all Plant 5 foremen at a luncheon meeting at twelve noon on Friday, December 1. It will be held in Private Dining Room A, adjacent to the cafeteria. Please come prepared to offer suggestions. If you are unable to attend, please call this office before eleven Friday morning.

Such notices can be individually typed on letterheads, inter-office memorandum sheets, or cards, or they can be duplicated by some mechanical process if a number of copies are needed.

Follow-up Letters. The secretary should have in operation some type of follow-up system on unanswered letters so that she will know when and to whom to write reminder letters. It is important to be tactful in such letters. Their composition requires thought and care, for no one likes to be reminded of his negligence or lack of promptness. The reminders, however, must be written, and they must not irritate. The following are examples of well-written follow-up letters.

> Up until the last mail we had not received your expense report covering the period from May 10 to May 20. If it has been lost in the mail, will you rush us another copy. As you know, we cannot reimburse any of the men until all expense reports are approved by the comptroller.

> On May 18 we wrote you asking for detailed information about several of your recent transactions. We are eager to get your answer so that we can write to the contractors direct. Would it be possible for you to get the information to us by this week end? We do not want the matter to drag on indefinitely, but neither do we wish to impose any hardship upon you.

> This is just a reminder that we have not received your check for next year's dues. Very probably you have overlooked it. Our annual report must be mailed next week,

> and we are very anxious to have a 100 per cent record on paid-up memberships. If you can conveniently send the check, the Chapter will appreciate it.

Technical Letters. The ability to write technical letters for the employer depends upon the secretary's knowledge of his business. Usually she is not required to compose such a communication. But if she is, she should make a rough draft and give it to the employer for his approval. If the employer is out of town and circumstances compel her to write a technical letter, she should clearly state in the letter that the employer is absent and that she believes he would answer thus and so, but that he may wish to write further on the subject on his return.

BUSINESS LETTER COMPOSITION

The secretary's letters should conform to the employer's style of expression if they are to be signed by him. If they are to go out over the secretary's signature, then they can follow her own style. The feminine secretary need not attempt to be masculine in her writing style. In fact, many career women say, "Always be feminine in an office position."

THE C's OF BUSINESS LETTER WRITING

The secretary's letters must be complete, correct, clear, courteous, and concise.

Completeness. A business letter is complete if it includes all essential information. A detail in the letter is essential if it assists the reader in understanding the message that the writer is attempting to convey. The length of a letter is not a gauge of its completeness. A short letter is complete if all that is vital to the message has been included. The incomplete letter is a costly letter, because the reader will probably need to write for additional information.

Correctness. Although a business letter must be correct in every detail—including English, spelling, paragraphing, punctuation, arrangement, and form—it must also be accurate as to the information in the body of the letter. To be correct, a letter not only must include accurate information, but also must state the facts so that the reader cannot misunderstand what is written. An inaccurate detail in a letter, even though understood by the reader, gives an unfavorable impression.

Clearness. A good letter is written as simply as the subject matter permits. It is free from ambiguity and vagueness. It is direct in expression. Such clarity is usually a result of careful planning, because the writer who has all the pertinent facts at hand and who knows exactly what he wants to say has little trouble in expressing his thoughts simply and directly.

Courtesy. Courtesy in business letter writing is just as important as in any other type of business relationship. A business letter that is complete, correct, and clear may fail to generate goodwill because it fails to reflect a courteous attitude. In this sense the "please's" and "thank you's" are essential parts of an acceptable business letter.

Conciseness. A business letter should be no longer than is necessary to accomplish its purpose. This does not mean that the short letter is necessarily the best. It does mean that a letter should be long enough to achieve the goals of completeness, correctness, clearness, and courtesy. Brevity alone is not a merit; rather it is usually a fault. But conciseness is emphasized here because the inclusion of nonessentials, either in words or ideas, may defeat the purpose of the letter. Very frequently, furthermore, conciseness gives proper emphasis to the main thought of the letter.

Most of us are guilty of using more words than are necessary to say what we mean. Very frequently the redundant expression "call me by telephone" is used even though everyone understands that a request to "call me" means that the call should be made by telephone. Likewise, the clause "When Mr. Baker returns to the office" is no more complete or clear than "When Mr. Baker returns."

TONE

The tone of a business letter should reflect a friendly personal attitude. Many persons in the business world are successful in giving this tone to their face-to-face conversations, but they fail in this respect in written communications. For some reason such persons express themselves impersonally and more formally when their thoughts are to be communicated in written form. A writer of business letters who has difficulty in this respect usually finds

it helpful to visualize the reader as he dictates or writes and to imagine himself carrying on a personal conversation.

The tone of a business letter will usually be good if the writer takes into consideration the reader's point of view. This thought is frequently identified as the "you" attitude. The term is appropriate, but it has been misinterpreted at times to mean that a good business letter must use the pronouns "you" and "your" more frequently than "I" and "my" or "we" and "our." A better test of the tone of a letter is whether it sincerely takes into consideration the point of view of the reader. He must read this attitude in the plain black-and-whiteness of the typewritten words.

The letter should be written in the affirmative if possible. Even though it is necessary to say "No" in the letter, try to soften the negative tone by saying first what you *can* do.

WORD CHOICE The secretary who writes business letters must be careful in her choice of words. There is one exact word or phrase to delineate each thought. If the word or the phrase does not come to mind immediately, the secretary should refer to a dictionary or thesaurus. Most persons who seem to have large writing vocabularies make frequent use of one or both of these aids. It is a sign of intelligence, not of ignorance, to use reference helps. Executives and secretaries must have large vocabularies. One good way of building a writing vocabulary is to read well-written magazines and books.

Absolute exclusion of hackneyed phrases should be the goal. Such oldtimers as "beg to state," "yours of the tenth," or "This is to advise you that" are obviously trite. Note the number of unnecessary words in these examples:

(a) *This is to advise you that* Mr. Kern will be in Kansas City on Tuesday.
(b) *This is to advise you that* your order dated September 1 has been shipped.

Likewise, if every answer were started, "This is in answer to your letter of . . ." that phrase would become hackneyed. If you can achieve variety in expression, you will avoid developing into a letter writer dependent upon stereotyped phrases.

Of course, some phrases are necessarily used very frequently. They cannot be classed as hackneyed, for they are in essence simple, short ways to express certain thoughts.

MECHANICS OF COMPOSITION There are a number of ways to go about drafting a business letter. The methods most commonly used are the following:

(1) Compose the letter carefully in longhand. This method is slowest of all and should be used only when the letter is of such importance that it requires very deliberate thought.

(2) Compose it in shorthand on a notebook page. This permits the secretary to write as fast as thoughts are formulated, provides an opportunity to change and to improve the draft, and furnishes a notebook record. It is the one used by most secretaries who do not have dictating facilities.

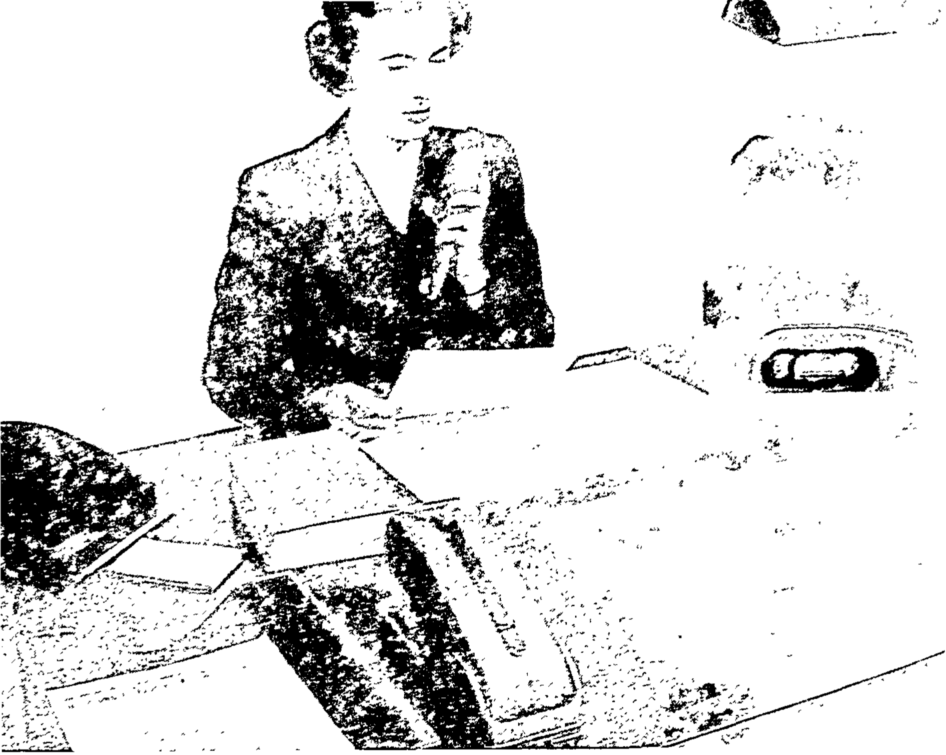
(3) Compose it as it is being typed. This requires facility of expression and does not allow for changes of mind. Unless the letter is very short, it almost always calls for a rewrite.

(4) Dictate it to a stenographer or to a dictating machine.

Dictating technique is readily learned. A person accustomed to taking dictation can develop into a good dictator with little effort. A secretary appreciates the reasons for speaking distinctly and not too hurriedly, phrasing logically, and spelling proper names. At first it may seem a little awkward to compose verbally. If you decide before starting *what* you are going to say and possibly outline your letter, then you need concentrate only on *how* you say it.

THE DICTATING MACHINE If machines for dictation and transcription are used in the office, the dictating machine may be available to the secretary at certain times during the day for her work in handling correspondence that is to be transcribed by stenographers in the office. The secretary should not find it difficult to operate a dictating machine, particularly if she has had some experience in the use of the transcribing machine.

When the secretary is ready to start dictation, she presses the starting control device and speaks in a natural tone just as



SECRETARY ANSWERING A ROUTINE LETTER

Sometimes the secretary dictates to voice-writing equipment the replies to routine letters, and her assistant transcribes them.

she would over a telephone. When she pauses for thought, she releases the control to stop the rotation of the record. If she wishes to check on what she has dictated, she can do so, because the dictating unit will reproduce the dictation as well as record it. Special instructions, such as those for corrections or number of carbon copies, may be dictated or indicated on the strip of paper attached to the dictating unit. The point at which each new item is begun is also marked on the indicator slip so that the transcriber can place the material attractively on the page.

FORM LETTERS OR PARAGRAPHS After the secretary has been working for some time, she will realize that many situations recur that require identical handling. In order to save time and effort, she will probably want to prepare a file of form letters to which she can refer when routine correspondence is being written. For instance, she may include a request for credit information, a request for a hotel reservation, an

acknowledgment of a letter of application, or a letter to accompany a remittance. When these forms are prepared, labeled, and filed, the secretary needs only to change the address and salutation and to copy from the form letter.

Either the secretary or the employer may, in the course of letter composition, hit upon a particularly happy choice of words that will build goodwill for the firm or ease a particularly difficult situation. If such sentences or paragraphs are typed, labeled, and filed so that they can be referred to quickly, time will be saved and better letters will result.

SECRETARIAL SIGNATURES The secretary may be entrusted with signing the mail for the employer when he is out of town or has left the office before the mail is ready. If so, each letter should be read carefully and entirely—even though she has composed or typewritten it.

There are three customary ways of signing mail under these circumstances: (1) The secretary may sign the employer's name in her own hand and add her initials or full name in very small letters beneath the signature; (2) if the employer has given permission, the secretary may imitate his signature; (3) if the letter has been composed for her signature as secretary, she should sign her own name only.

The following illustrations show the correct form, the line position, and the horizontal placement of the signature lines in relationship to the complimentary close for letters that the secretary signs.

Sincerely yours,

SHULTON, INC.

A. J. Shulton
H. H.

A. J. Shulton, President

EMPLOYER'S NAME WITH SECRETARY'S INITIALS, MODIFIED BLOCK FORM

Sincerely yours,

SHULTON, INC.

A. J. Shulton

A. J. Shulton, President

EMPLOYER'S SIGNATURE IMITATED, INDENTED FORM

Sincerely yours,

SHULTON, INC.

Harriet Hawkins

Harriet Hawkins
Secretary to Mr. Shulton

SECRETARY'S SIGNATURE, MODIFIED BLOCK FORM

Sincerely yours,

SHULTON, INC.

Harriet Hawkins

Secretary to A. J. Shulton

SECRETARY'S SIGNATURE, INDENTED FORM

REFERENCE INITIALS ON THE SECRETARY'S LETTERS

Secretarially composed letters should be keyed. One way is to transpose the employer's and the secretary's initials in the reference line. For example, employer H. R. Baker and secretary Linda Barnes may agree to have the initials read *LB:HRB* on letters she drafts. If Linda is composing, typing, and signing the letter, she may use just her initials, LB. If, however, she has used only her initials in the reference line on

letters dictated by her employer, she may use LB:wbh (written by herself) on letters that she has composed. The important thing is to have a mutually agreed-upon key that is followed consistently.

DISPATCHING THE MAIL In some large offices secretaries are relieved of all the final work of sending out correspondence. Mail clerks collect the signed letters and the envelopes and are responsible for folding, inserting, sealing, and stamping them. In smaller offices the secretary attends to every step of the routine.

Throughout this book stress has been placed on the importance of the secretary's "following through." In no other place is this more important than in the mailing of important or rush items. The secretary who assumes the responsibility for seeing that mailing is expedited can prove invaluable to her employer.

Folding and Inserting Letters. A letter is ready to be folded when it is signed, when all enclosures are properly and securely attached, and when all under-separate-cover mail has been prepared or arranged for.

The actual folding and inserting of letters is important because time can be wasted by unnecessary movements. Every letter should be folded in such a way that it will unfold naturally into reading position. First, have a cleared space on the desk. Then take a letter from the stack of signed mail, place it before you on the desk, and fold it neatly. Insert it into the envelope at once. Finally, lay the envelopes aside in a stack with each flap up flat (not folded down over the envelope) and with the address side of the envelope on the bottom.

To fold letters properly and efficiently, the following procedures are recommended:

For a small envelope—three folds of a one-page letter:

1. Place the letter on the desk with the face up in reading position.
2. Fold the sheet up from the bottom to a point about one-half inch from the top edge. Crease the fold, keeping the side edges even.

3. Fold from the right to the left approximately one third of the width of the sheet.
4. Fold from the left to the right, making the fold slightly less than a third of the width of the sheet and leaving a half-inch margin at the right.

To insert the folded letter into a small envelope, take the letter in the right hand, last crease at left; hold the envelope in the left hand, address side down with the flap open to the right; slide the letter into the envelope.

For a large envelope—two folds of one or more sheets:

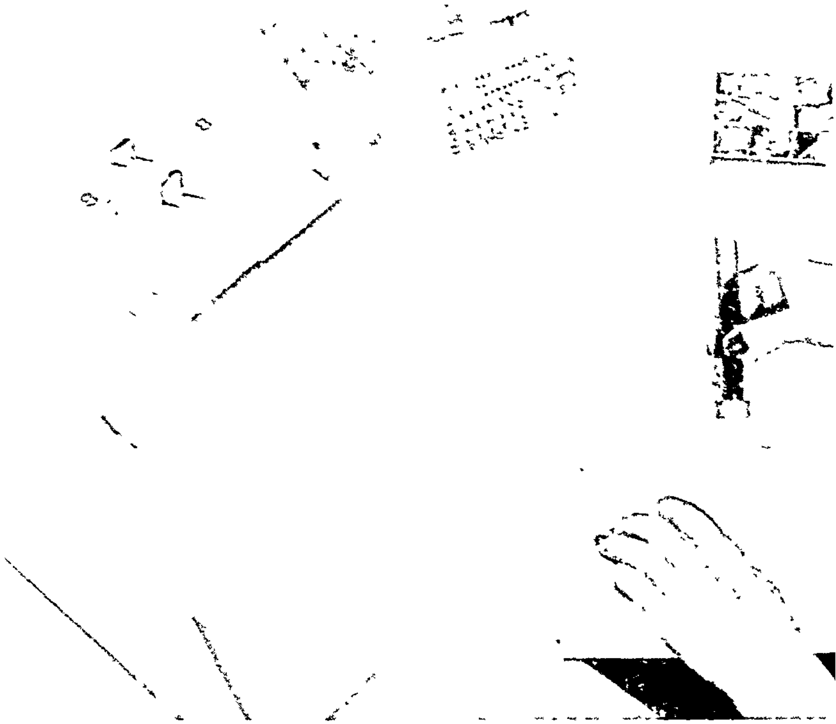
1. Place the letter sheet or sheets on the desk with the face up.
2. Fold the bottom third toward the top. Crease the fold, keeping the side edges even.
3. Fold the top downward to a point about one-half inch from the first fold. Crease the fold, keeping the edges even at the sides.

For a window envelope—two folds:

1. Place the sheet on the desk with the face up.
2. Fold the sheet from the top down two thirds of its length.
3. Fold the top back the required distance to make the address come behind the "window" of the envelope.

SEALING ENVELOPES Use the sponge method or one of the moistening devices to seal envelopes. Never lick an envelope flap. This practice is not hygienic, and you can cut your lips painfully on the razor edge of the flap.

Sponge Method. A very quick way of sealing envelopes by hand is the sponge method. When all letters are enclosed, joggle the envelopes into a neat stack. All of the flaps will already be opened out if the envelopes were stacked properly. Now pick up the stack, grasping the flaps, and bend them back in order to make them flatter. Holding the short edges of the stack of envelopes between the two hands, drop the envelopes off the bottom one at a time, down on the desk, so that only the gummed part of the flap of each envelope is visible. Then take



SEALING ENVELOPES BY THE SPONGE METHOD

By adopting timesaving routines and by positioning materials for convenient handling, the secretary can increase her efficiency greatly. Notice the location of the stamp box and the postage scale.

a not-too-moist sponge, and, with one swing of the arm, start at the bottom and moisten all of the flaps at once. Lay the sponge aside on a blotter, dry the hands, and start sealing the envelope nearest you by folding over the flap. Continue up the column. As you seal each envelope, pick it up in your left hand. Then exert pressure to the whole stack of envelopes at once. Fan the envelopes now to make sure that no two are sticking together. This occasionally happens when a too-wet sponge leaves excess moisture that squeezes out underneath the flaps. If necessary, use a clean blotter to absorb the moisture.

Moistening Devices. Using a moistener is usually less messy than the sponge method; but it is considerably slower, for it is a one-at-a-time system. With the roll type of moistening device the envelope flap is pulled over a moistened rotating wheel that passes through a shallow reservoir of water at the bottom. Some secretaries use a simple water-filled tube with a sponge or brush end. These devices are usually small enough to keep on top

FRAILEY, L. E. *Handbook of Business Letters.* New York: Prentice-Hall, Inc., 1948, 1301 pp.

————————. *Smooth Sailing Letters.* New York: Prentice-Hall, Inc., 1941, 117 pp.

Letters That Click. New York: Printers Ink Publishing Company, 1948, pp. 296–356.

LEWIS, LESLIE L. *Business Correspondence.* Chicago: Dartnell Corporation, 1949. (Seven booklets)

PARKHURST, CHARLES C.; DAVIS, ROY; and FRAZER, WM. *Business Writing—Theory and Practice.* New York: Prentice-Hall, Inc., 1941, pp. 9–52.

SHURTER, R. L. *Effective Letters in Business.* New York: McGraw-Hill Book Company, Inc., 1948, pp. 1–73.

QUESTIONS ON READINGS

1. Distinguish between the following routine letters: an acknowledgment, a covering letter, a request or inquiry, a notice, and a follow-up letter.

2. What are the three requisites of a good letter of acknowledgment?

3. Is a covering letter necessary when samples of office supplies are returned to the dealer? Why?

4. What should be included in a covering letter?

5. Routine letters of inquiry frequently omit essential information because the secretary assumes that the recipient understands the purpose of the inquiry as well as she does. How can the secretary avoid this difficulty?

6. Why should the secretary check and double-check the calendar and first draft of a notice of a meeting? What four questions should be answered in the notice?

7. What special problem is involved in writing a follow-up letter?

8. What are the five C's of business letter writing?

9. How can the secretary indicate by reference initials that she composed the letter?

DISCUSSION QUESTIONS

1. One student described effective business letter writing as "saying 'No' so painlessly that it sounds like 'Yes.'" How can the tone of the letter be developed to create this impression?

(b)

(1) Dear Mr. Smith:

(2) We are sending you a copy of our
(3) catalog, and it should reach you by
(4) the day after tomorrow. Mr. John-
(5) son, our new salesman in your ter-
(6) ritory, will visit you this month,
(7) We trust that you will give him
(8) orders to fill your requirements.
(9) Quality-Plus Products can meet your
(10) needs for high quality goods for
(11) resale.

(12) You failed to place any order with
(13) us in December, and we want your
(14) business.

(15) Truly yours,

2. Rewrite the two letters in Problem 1.

3. Form letters are timesavers. Since they are to be used repeatedly, they should be composed with the greatest care.

(a) Prepare a form sentence or paragraph to be used as an *opening* for a letter written in each of the following situations:

1. A customer files a complaint against your company for the way in which his order was handled.
2. You acknowledge a request for a catalog.
3. You ask a credit agency about the credit of an applicant for a charge account.

(b) Prepare a form sentence or paragraph to be used as a *closing* for a letter written in each of the following situations:

1. A customer has written about an error which the company made.
2. An application letter has been received for a position not vacant.
3. An order will be delayed in shipment because of difficulty in getting materials.

4. The most attractively arranged letter will lose part of its *effectiveness if it is improperly folded.* Be prepared to:

(a) Fold a single letter sheet for a small envelope and insert the folded sheet into the envelope.
(b) Fold a single letter sheet for a window envelope and insert it.
(c) Fold a two-page letter for a large envelope and insert it.

PROJECTS

A. Stereotyped Phrases. In order that you may avoid falling into the habit of using stereotyped phrases in the letters which you are called upon to compose, you selected the following list of sentences from incoming and outgoing mail for study. Rephrase the sentences, avoiding the use of hackneyed expressions.

(1) Replying to yours of the 10th, we beg to state that your order has been shipped.
(2) Please advise by return mail cost of same.
(3) Please call at your earliest possible convenience to discuss this matter.
(4) Enclosed please find our check for $15.
(5) In the near future we trust that we can serve you again.
(6) Thanking you in advance, I remain, yours truly,
(7) We take the liberty of calling your attention to the error.
(8) As soon as possible we shall get in touch with you again.
(9) At this writing we do not have the necessary information.
(10) The writer wishes to express his appreciation for your kind services.
(11) Due to the fact that the season is late, we are offering our entire stock at greatly reduced prices.
(12) Please favor us with a reply by return mail.
(13) We have credited your account for same.
(14) The contents of your letter have been duly noted.
(15) Please permit me to state that your business is valued.

B. Composing a Letter. The style of letter that you recommended for office use in Project A, page 124, was adopted by your employer for company-wide use, and instructions were forwarded to all branch offices to that effect. Elmer C. Freeman, manager of the Portland, Oregon, branch (6109 Sutter Street), has written to your employer, Mr. Simpson, criticizing the selection. He feels that another form is more appropriate and, furthermore, that there is no reason for having a uniform style.

Since Mr. Simpson adopted the letter style on your recommendation, he asks you to prepare a letter for his signature in reply to Mr. Freeman's criticisms.

CHAPTER 9

FILING AND FINDING

THE care and the safekeeping of correspondence and records so that any item can be quickly found when needed are of utmost importance to every business and of special concern to the secretary. A large office may have a central filing department to which all firm correspondence is sent to be filed by a staff of trained clerks. The employer's personal and confidential correspondence, however, the secretary may file in her own office. If a secretary is working for a small firm, she may have the full responsibility of the files, from planning to maintaining and improving them.

When many people think of filing, they are reminded of the large central files of some organization they have visited. The secretary, however, has numerous other files which aid her in her work. For example, she can organize her work more efficiently by keeping desk reference files, such as those pertaining to the names of important clients, telephone numbers frequently called, addresses of regular correspondents, items that must be followed through before they are placed in the central files, stock identifications and descriptions, and work in process. These desk reference files not only save much time that would otherwise be lost in hunting for frequently needed facts, but also free the secretary for other work. Each secretarial desk differs because of the employer's position and type of business. The desk reference files you set up will be those you need most; they can be planned only after you are on the job.

THE SECRETARY'S USE OF THE CENTRAL FILES

When the secretary is employed in an office that operates a central filing department, she must follow the procedures set up by that department for releasing materials to be filed, for

requisitioning materials from the files, and for returning those materials to the filing department. These procedures and the forms used vary slightly in different offices, but the purposes are always the same. A well-organized filing department makes every effort to file materials rapidly and accurately as soon as they are received, to supply quickly those materials that are requisitioned from it, to keep a record of all materials taken from the files, to secure the return of these materials within a reasonable time, to strip the active files periodically of those materials that are no longer of current importance, and to fix responsibility for the careful completion of each step. A filing system is no better than the instant "findability" of the materials filed in it.

RELEASING MATERIALS When the secretary places an incoming letter in the filing basket or box in her office to be collected and delivered to the filing department, the letter should bear a notation, known as a *release mark*, to indicate that it is ready for filing. The release mark usually consists of the initials of the secretary in the upper left-hand corner, but sometimes a *File* stamp is used with space for the secretary's initials. The use of a release mark reduces the chances of an incoming letter's being filed before it is answered.

A release mark is not considered necessary on a carbon copy of an outgoing letter because it is assumed that, after the letter is typed, the carbon copy is ready to be filed. Likewise, if a carbon copy of an outgoing letter is attached to the incoming letter that the outgoing letter answers, a release mark should not be necessary.

REQUISITIONING MATERIALS FROM THE FILES When the secretary knows at the time the materials are released for filing that they will be needed at a definite future time, she can mark or stamp on each item the notation "Follow-up" or "Tickler" with the date when she wishes the material to be returned to her. More frequently, however, the secretary will not know at the time that she releases materials for filing just when they will be needed again. In these cases she will make her request for such materials when they are needed in the manner designated by the filing department. She may com-

municate her request in person or by telephone, or she may complete a special form known as a *requisition card* and send it to the filing department. The request may be for the entire contents of a folder for a particular person, business, subject, or community, or it may be for specific items in a folder.

Date Due Aug 3, 195– Charge Date Aug 1, 195–

MATERIAL REQUESTED FROM FILES

Name or Subject Queen City Office Supply Co.

Address Cincinnati, Ohio

Date of Material Latter part of June

Regarding Adjustment on June statement

Requested by

Name H. David Saunders

Department Accounting Date of Request Aug 1, 195–

REQUISITION CARD

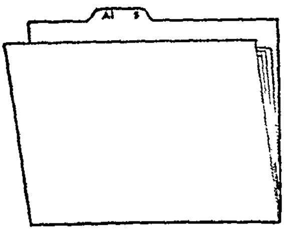
The secretary requests material from the central file on a standardized form such as this.

If the secretary has requested a complete folder of correspondence, it may be delivered to her in the regular file folder or in a special *carrier folder* of a distinctive color that is marked "Return to files." Separate items may be delivered as such or in a folder. Regardless of how the materials are delivered to the secretary, she should return them just as soon as possible so that other persons who may wish to use those same items will be able to secure them without a great deal of delay.

A special problem arises when materials that the secretary has requisitioned and received are transferred to someone in another department before they are returned to the filing department. In some businesses a special form is available for reporting such a transfer to the filing department. Whether or not this special form is available, the secretary should inform the filing department of the transfer so that she will no longer be charged for those materials and so that the filing department will know where they may be located if they are needed.

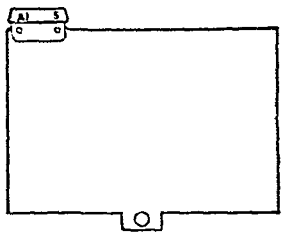
and assumes the full responsibility of the files, however, she will have only her own inaccuracies with which to contend.

VERTICAL CORRESPONDENCE FILING Vertical or drawer files, usually four or five drawers high, are familiar to all. The term *vertical* is derived from the fact that the papers in a folder are filed on edge rather than flat. Each drawer is wide enough and high enough to accommodate standard-sized correspondence. A battery of such files is sometimes arranged so as to form a counter or even to serve as a partition.



FOLDER

Inside the drawer, stiff pressboard cards called *guides* divide the folders into convenient sections. On the tabs of these guides are printed the division captions, that is, the names, letters, or numbers representing the sections into which the drawer is divided. The file folders, which are lightweight and somewhat flexible, are placed in correct order behind the guides. They, too, are cut with tabs on which their names can be written.



CORRESPONDENCE GUIDE

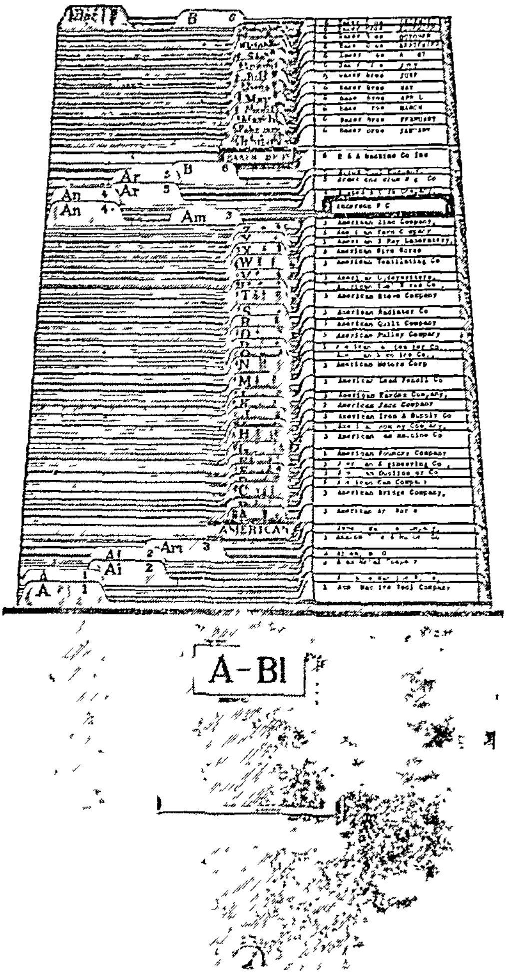
The most widely used systems of vertical filing are:

(1) Alphabetic
(2) Numeric
(3) Geographic
(4) Subject

Alphabetic Filing. In alphabetic filing systems, material is filed in alphabetic sequence chiefly according to the names of the correspondents. Guides with printed tabs that subdivide the alphabet into from 25 to 10,000 divisions may be purchased. The most common sets contain 25, 40, 60, and 80 divisions. In addition to the alphabetic division captions, numbers indicating the sequence of the guides may be printed on the tabs.

Most guides have single notations, such as A, Al, and Ap. A single notation indicates only the beginning of its section in the file drawer. Closed or double notations, such as Aa–Al and Am–Aq, indicate the range of the materials filed in each section.

In the alphabetic system, a regular correspondent is given an individual folder, which is filed behind the proper alphabetic guide. All miscellaneous correspondence beginning with a like alphabetic division is filed in a single folder following the individual folders. This single folder for miscellaneous correspondence has a tab caption exactly like the caption of the guide it follows. If the tab of each folder is numbered to agree with the guide it follows, filing time is reduced and accuracy is increased.



DRAWER OF AN ALPHABETIC FILE

Numeric Filing. In some businesses and institutions it is advantageous to assign a reference number to each case or client. Material is then filed according to that number, in numbered folders, in numeric sequence. An alphabetically arranged card index is needed so that the reference numbers of the correspondents can be determined quickly. The guides of a numeric file are imprinted with numbers, usually in units of ten. Each file folder may carry both the number and the name of the correspondent.

Geographic Filing. Where it is of value to keep records, such as sales or collections, by units or territories, the geographic system is used. In this system the guides may be imprinted with the names of the states in alphabetic sequence. Larger cities may form a first subdivision and may be written on blank guides. The con-

tents of the miscellaneous folders are filed alphabetically usually by the name of the city and then by the name of the correspondent. Individual folders are used in the same manner as in an alphabetic file.

Subject Filing. Subject files are used to preserve related information about subjects or jobs. For instance, in an architect's office all correspondence, bills, and contracts may be filed under the name of the job, and then under subject subdivisions such as Contractors, Bills Rendered, and Superintendent's Weekly Reports. Each contractor may have an individual folder. If he is working on other jobs for the architect, he will have an individual folder under each job. Folders arranged chronologically by months may be used for the superintendent's reports.

Subject files may be subdivided alphabetically or numerically. The *duplex-numeric system* provides for the use of an Arabic number for the main subject, followed by a dash and another number for a subdivision. This subdivision can be further broken down by adding numbers; for example, if 2 indicates *Law* in a file of collected reference material, 2-3 might indicate *Laws-County* and 2-3-6 might indicate *Laws-County-Zoning*. Such a system allows for almost unlimited expansion. The *duplex-alphabetic system* operates in the same manner, differing only in the use of letters instead of numbers. The *alpha-numeric system* is a combination system in that it uses numbers and letters alternately.

The *Dewey decimal system*, which Melvil Dewey devised for library classifications, is very useful when the subject file must be broken down into minute subdivisions. The subjects are divided into not more than ten general classifications numbered in hundreds from 000 to 900, inclusive. Each of these major classes may be divided by units of ten, such as 100, 110, 120, etc. And again these classes may be further subdivided by units of 1, such as 110, 111, 112, etc. Subdividing can be continued by the use of the decimal point and can be continued indefinitely, for example, 126.1, 126.2, 126.21, 126.22, 126.221, ad infinitum. The pages of printed loose-leaf publications, in which additional pages are frequently inserted, are usually numbered with this system.

the method of sorting material into several small groups on her desk top and then dividing each of them into smaller groups and so on until the entire set was in perfect order.

Rules of Alphabetic Indexing

Since all filing systems are based directly or indirectly upon the alphabetic system, the following rules of alphabetic filing should be mastered. The examples under each rule are listed in correct alphabetic order.

Names of Persons

1. Nature and Order of Indexing Units. Each word or initial in the name of a person is a separate indexing unit. In determining the alphabetic arrangement of these names, the indexing units are considered in the following order: surname (last name); first name, initial, or abbreviation; middle name, initial, or abbreviation.

	Index Order of Units		
Names	Unit 1	Unit 2	Unit 3
Robt. Brown	Brown,	Robert	
R. C. Daniels	Daniels,	R.	C.
Ralph G. Long	Long,	Ralph	G.
C. James Vinson	Vinson,	C.	James

2. Surnames. (a) A surname prefix is considered to be a part of the first indexing unit. Among the common prefixes are D', Da, De, Del, Des, Mac, Mc, O', Van, Vander, Von, and Vonder. In some cases the first letter of a prefix is not capitalized.

	Index Order of Units		
Names	Unit 1	Unit 2	Unit 3
Charles Dubois	Dubois,	Charles	
L. V. Du Bois	Du Bois,	L.	V.
R. W. Mac Gregor	Mac Gregor,	R.	W.
Jim Magrish	Magrish,	Jim	
James E. McGregor	McGregor,	James	E.
C. Henry O'Connor	O'Connor,	C.	Henry
Albert O'dell	O'dell,	Albert	
Helen O'Keefe	O'Keefe,	Helen	
Walter von Behren	von Behren,	Walter	

title is considered as the first indexing unit when it is followed by a given name only. (c) A designation of seniority, such as "Junior" or "Senior," or "II (Second)" or "III (Third)," is considered an indexing unit at the end of the name.

	Index Order of Units		
Names	Unit 1	Unit 2	Unit 3
Miss Mary J. Athens	Athens,	Mary	J. (Miss)
Rev. A. O. Hanson	Hanson,	A.	O. (Rev.)
Ralph Jason, D. D.	Jason,	Ralph (D. D.)	
Madame Louise	Madame	Louise	
Capt. Orrin Mason	Mason,	Orrin (Capt.)	
Monsieur Pierre	Monsieur	Pierre	
Prince Paul	Prince	Paul	
Sister Ancilla	Sister	Ancilla	
Mrs. Ann Jones Wilson	Wilson,	Ann	Jones (Mrs.)
Harold Wilson, Jr.	Wilson,	Harold	Junior
Harold Wilson, Sr.	Wilson,	Harold	Senior

5. Addresses. When the names of individuals are completely identical, their alphabetic order is determined by the cities in their addresses. For filing purposes the word "City" should not be used in place of the city name for local correspondents. Names of states are not considered unless the names of the cities are also alike. When the city and the state names as well as the full names of the individuals are alike, the alphabetic order is determined by street names.

	Index Order of Units		
Names	Unit 1	Unit 2	Unit 3
Edward Horton, Akron	Horton,	Edward,	Akron
Edward Horton, Dixon	Horton,	Edward,	Dixon
Edward Horton, Elgin	Horton,	Edward,	Elgin
John Ross, 314 Elm Street, Beloit John Ross, 92 Plum Avenue, Beloit	Order determined by street names, which are fifth indexing units in these examples (state is the fourth indexing unit)		

6. Names of Married Women. The name of a married woman is indexed according to her legal name (her given first name, her maiden surname, and her husband's surname; or her given first name, her given middle name, and her husband's surname). The title "Mrs." is disregarded in filing, but it is placed in parentheses after the legal name. The husband's name may be given in parentheses below the woman's legal name.

is the first word of a firm name, it is written in parentheses at the end of the name in its index form.

Names	Index Order of Units		
	Unit 1	Unit 2	Unit 3
Dodd and Myer Co.	Dodd (and)	Myer	Co.
French & Green Co.	French (&)	Green	Co.
The John Stone Co.	Stone,	John,	Co. (The)

10. Abbreviations and Single Letters. (a) An abbreviation in a firm name is considered as if it were written in full even though the abbreviation is a single letter. (b) A single letter in a firm name other than an abbreviation constitutes a separate filing unit. It precedes all names that are written out or abbreviated in that same unit when they begin with that same letter.

Names	Index Order of Units		
	Unit 1	Unit 2	Unit 3
AB Stores	A	B	Stores
A B Stoves	A	B	Stoves
A to Z Drugs	A (to)	Z	Drugs
A–Z Hardware	A	Z	Hardware
B & O R. R.	Baltimore (and)	Ohio	Railroad
Jackson Theaters, Inc.	Jackson	Theaters,	Incorporated
Wagner Mfg. Co.	Wagner	Manufacturing	Company

11. Numbers. A number in a firm name is considered as if it were written as one word. It is considered as one indexing unit.

Names	Index Order of Units		
	Unit 1	Unit 2	Unit 3
A 1 Garage	A	One	Garage
41st Avenue Laundry	Forty-first	Avenue	Laundry
3rd St. Bldg.	Third	Street	Building

NOTES: (1) Although a number is considered as a word, it is written as a figure if that is the form in which it is commonly used. (2) When several names differ only in numerical designations, the order of those names may be based upon the numerical sequence instead of the alphabetic order of those numbers written in words. For example, if several branch stores of the same company are numbered, it might be more convenient in an office to have the names arranged in numerical sequence.

Names	Index Order of Units: Unit 1	Unit 2	Unit 3
DeLand Waterworks	DeLand	Waterworks	
Del Norte Hotel	Del Norte	Hotel	
Des Moines Park	Des Moines	Park	
El Paso Lunchroom	El	Paso	Lunchroom
La Salle Studios	La	Salle	Studios
Los Angeles Heaters	Los	Angeles	Heaters
McHenry Gas Company	McHenry	Gas	Company
North Dakota News	North	Dakota	News
St. Louis Traction System	Saint	Louis	Traction
San Diego Fruits	San	Diego	Fruits
Van Buren Inn	Van Buren	Inn	

13. Possessives. When a word ends in *apostrophe s* ('s), the final *s* is not considered as part of the word for filing purposes. When a word ends in *s apostrophe* (s'), however, the final *s* is considered.

Names	Index Order of Units: Unit 1	Unit 2	Unit 3
Girl's Sportswear	Girl's	Sportswear	
Girls' Short Stories	Girls'	Short	Stories
Harper's Restaurant	Harper's	Restaurant	
Harpers'	Harpers'		

14. Addresses. Identical names of businesses are arranged alphabetically by names of cities. For filing purposes the word "City" should not be used in place of the name of the city. If the names of the cities are also alike, filing arrangement depends upon names of states. When two or more branches of a business are located in the same city, the names of the branches are arranged alphabetically by streets.

Names	Index Order of Units: Unit 1	Unit 2	Unit 3
Jones Stationers, Decatur	Jones	Stationers,	Decatur
Jones Stationers, Eureka	Jones	Stationers,	Eureka
Jones Stationers, Sterling	Jones	Stationers,	Sterling
Kastner's, 531 Main Street	Kastner's,	Main	
Kastner's, 1024 Oak Street	Kastner's,	Oak	
Kastner's, 5241 Stanley Drive	Kastner's,	Stanley	

Other Names

15. Government Offices. (a) The name of a Federal Government office is considered for indexing in the following order: (1) United States Government, (2) principal word or words in

the name of the department, (3) principal word or words in the name of the bureau, (4) principal word or words in the name of the division. Such words as "Department of," "Bureau of," and "Division of" are disregarded and for that reason are usually placed in parentheses.

NAMES	INDEX FORM
Bureau of the Census U. S. Department of Commerce	United States Government Commerce (Department of) Census (Bureau of the)
Office of Indian Affairs U. S. Department of the Interior	United States Government Interior (Department of the) Indian Affairs (Office of)

(b) The name of a political subdivision is considered in the following order: (1) principal word or words in the name of the subdivision, followed by its state, county, or city classification, (2) important word or words in the name of the department, board, or office.

NAMES	INDEX FORM
Department of Public Safety State of California	California, State (of) Public Safety (Department of)
Tax Collector Cook County	Cook County Tax Collector
Board of Health Trenton	Trenton, City (of) Health (Board of)

16. Banks. When only local banks are involved, their names are indexed as written. When banks from several cities are involved, however, the names of the cities in which the banks are located are considered as the first indexing units with the words in the names of the banks following. If several states are involved, the names of the states should be used as the last indexing units.

NAMES	INDEX FORM
Third National Bank, Duluth	Duluth: Third National Bank, Minnesota
Fargo Savings Bank	Fargo Savings Bank, North Dakota
Madison Trust Company Madison, Wisconsin	Madison Trust Company, Wisconsin

17. Other Organizations — Churches, Schools, Clubs. In a name for a nonbusiness organization, the most important word

or the word that most clearly identifies the organization is considered the first indexing unit.

NAMES	INDEX FORM
American Legion	American Legion
University of Illinois	Illinois, University (of)
Iowa State College	Iowa State College
Albany Kiwanis Club	Kiwanis Club, Albany
First Methodist Church	Methodist Church, First
Association of Wholesalers	Wholesalers, Association (of)

FILING PROCEDURES

PLACING MATERIALS IN FOLDERS The folder should be lifted an inch or two out of the drawer before material is inserted in order that the sheets can drop down completely into the folder. Material is placed in a file folder with the top of the item to the left edge of the folder and with the face of the item forward. This rule applies to sheets of irregular size also. Oversized paper should be neatly folded down to standard size. If an item such as a clipping is so small that it may be overlooked in the folder, it should be pasted to a sheet of plain paper of standard size before it is filed. Sets of related correspondence should be fastened together with staples. Paper clips should not be used for this purpose because they catch on other papers.

In an individual folder, that is, a folder reserved for the materials to, from, or about one correspondent, a letter or other item of material is placed to the front of the folder because recent correspondence is usually referred to most frequently. When letters for several correspondents are filed in one miscellaneous folder, the letters are first grouped alphabetically by correspondents' names and are then filed in each group by date. In this way the current letter is filed at the front of each correspondent's group of letters.

Miscellaneous folders are used for individuals and businesses with whom correspondence is infrequent. As soon as the number of letters for one of these correspondents reaches a certain minimum, for example six or ten letters, an individual folder is opened for the correspondent. The letters of that correspond-

who are looking for the same materials in the files will know where they are.

Several charge methods are in common use. When an individual item is removed from the folder, a *substitution card* is usually put in its place in the folder. This card indicates the nature of the material, the name of the person who has the material, and the date it was removed. When an entire folder is removed, an *out guide* with the appropriate information recorded on it may be substituted for the folder; or an *out folder* with a substitution card may be placed in the file drawer to take the place of the regular folder. Sometimes the regular folder is retained in the file drawer, and the contents of the folder are transferred to a special *carrier folder*.

TRANSFERRING MATERIALS Periodically, perhaps every six months or year, the secretary should transfer old correspondence to less active files. For instance, on June 30, all material for the preceding calendar year might be removed from the office file and placed in a transfer file. This procedure removes the inactive material from the current files and makes room for the material that will be filed during the succeeding year. Transfer files are usually one-drawer units of an inexpensive material, such as heavy corrugated cardboard. Insofar as possible, material should be transferred in the used folders, and new folders should be made out for use in the current file. The contents of every transfer file should be clearly marked and dated.

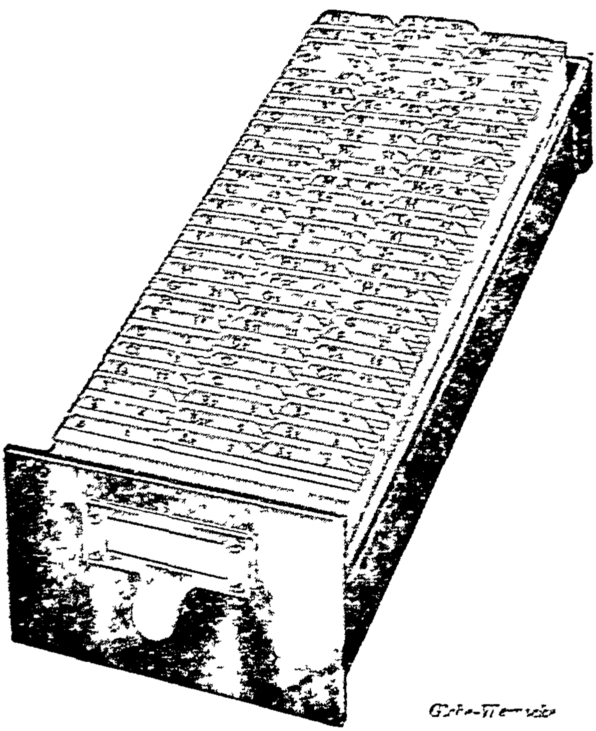
Because of the difficulty of providing adequate space for storing inactive filed material, and because of the possible need of reference to it, some businesses have found it expedient to utilize microfilm copies, which can be stored in a very limited space and kept indefinitely.

The problem of deciding what items to destroy in the transfer process is a difficult one. Items should be kept until they will no longer be needed, but the nature of the business and its methods of handling records will determine how long this period should be. Also, the statute of limitations in the state in which you are working will be a governing factor, as it specifies the number of years during which legal recourse may be sought.

Other Types of Files

The preceding discussion has pertained primarily to the filing of correspondence. Many other types of materials used in business offices, however, must be stored in a safe place and in a systematic manner for future use. Some of these materials require special types of filing equipment, but the principles and the procedures of correspondence filing, including the rules for alphabetic indexing, are the same.

CARD FILES Card files are used quite generally for indexes and library catalogs. Standard-sized cards are 5″ x 3″, 6″ x 4″, and 8″ x 5″. They are frequently



Globe-Wernicke

Vertical Card File

ruled so that the necessary information can be recorded on them in a minimum space and in the least time. A card file that is properly indexed with guides can be expanded easily.

File cards are printed in different forms to serve as personnel records, social security records, stock records, and sales records. They may be used also to record customer information, production and cost data, ledger entries, credit data, and the like.

A special type of card index file, known as the Soundex System, makes use of the principle of sound in indexing. It is designed to bring all names that sound alike but are spelled differently into the same section of the file. The system requires a special set of card guides and a special system of coding.

VISIBLE CARD FILES Visible index equipment is a rather recent development in record keeping. It is used extensively for perpetual inventories, purchase records, accounting records, sales records, and personnel histories. The file consists of shallow trays of card forms that are filed flat with only a small part of each card remaining visible. The visible portion of each card contains the name or other item of information upon which the indexing is based. The cards can be inserted and removed easily; and they are so fastened that the back of the card, as well as the front, can be used for record keeping. Colored signals are frequently used as a visible means of control; for example, a blue signal attached to the visible edge of a credit card at a given point may mean "Watch credit closely—limit indebtedness to $50."

LOOSE-LEAF BOOKS Ring binders or post binders frequently house the file copies of orders, invoices, vouchers, and the like, usually in numeric order. After a form is once filed in a post binder, it is virtually insured against loss as such forms are seldom removed. Post binders can be increased in height to take care of additional forms by merely adding extensions to the posts.

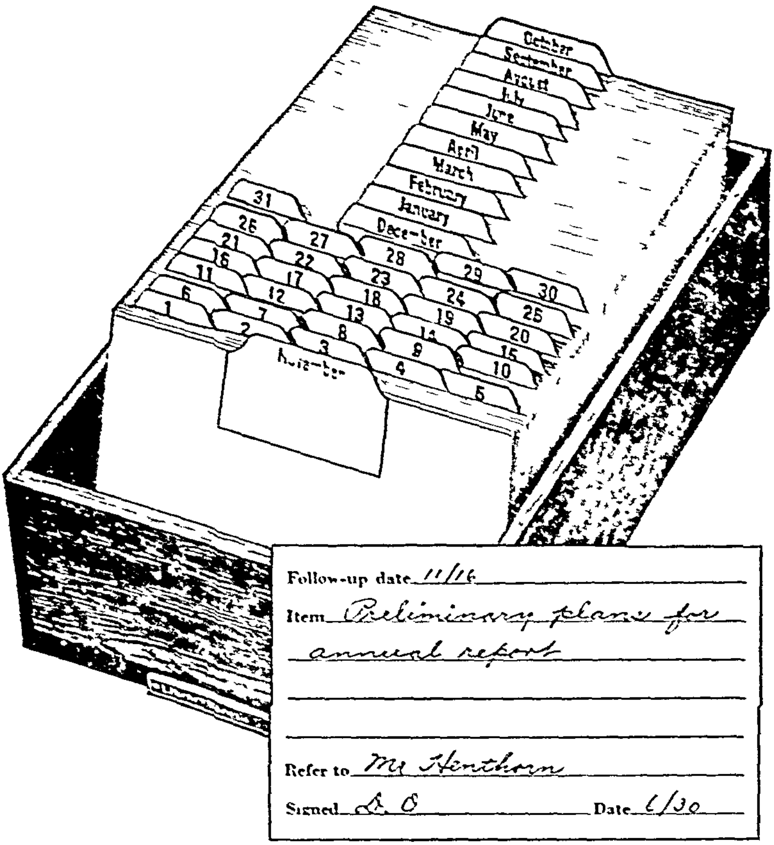
REFERENCE AND SAFEKEEPING FILES Many businesses must keep almost a library of highly technical material on file in their own offices. Such reference material may be filed by subject in steel vertical cabinets. The system used depends upon the need for current accessibility and the size of the material to be filed; that is, whether the material consists of clippings or huge multiple-volume directories, a hodgepodge of all sizes, or even samples of materials.

Tiers of wide, shallow drawers safeguard drawings, blueprints, and commercial-art work from mutilation. Wide-shelved cabinets are sometimes used for material that can be rolled and inserted into tubes. Double-width vertical drawer files can also be purchased in which to file such work. Half tones and electrotypes used in printing are carefully kept in shallow drawers of narrow width because they should be filed only one-deep and the weight of the cuts makes a wide drawer too heavy to open.

FOLLOW-UP METHODS A secretary frequently uses her daily calendar pad as a memory aid or follow-up to filing. She anticipates the date by which an answer to a letter is due and jots down such a memorandum on the future-date page of her calendar.

Pending Folder. The secretary may prefer to use a *pending folder*, placing in it all correspondence relating to matters that must be handled later; or she may make a memorandum sheet for the pending folder and file the correspondence. She may make a practice of typing an extra carbon of each matter requiring follow up, so that she can file it in the pending folder without holding the correspondence out of the file for an unduly long period. Such follow-up methods work very well if only a small volume of mail passes over the desk. Where there is a volume of work covering a lot of detail, however, as in an insurance office where policyholders must be notified of premiums due and expiration dates of policies, a controlled follow-up system should be used.

The Tickler. The card tickler is a common follow-up device. It consists of a tray or box containing one set of card guides for the months of the year and a second set numbered from one to thirty-one for the days of the months. Each follow-up item is written on a separate card and filed behind the proper date. Card items are not necessarily confined to correspondence follow-ups but are used for all future-date purposes—court hearings, meeting dates, work programs, telephone calls, engagements, employer's private affairs, such as family birthdays and anniversaries, and interest payments due. From the secretary's point of view, the advantages of a card tickler system are obvious. It is a mechanical memory aid which leaves her free



CARD TICKLER

The follow-up card shows that on June 30 Mr. Henthorn asked his secretary to remind him on November 16 that work on the annual report should be started.

to concentrate on the work of each day. It helps to prevent her from forgetting items that must be called to the employer's attention. Such a system is workable and flexible. A card once made out can be moved ahead if necessary and is destroyed when the matter has been taken care of.

The tickler system may use letter-sized file folders instead of small cards. In businesses where a permanent tickler record is useful, such as in a bank, a bound book with each page bearing a new date is used.

Any tickler system must be used conscientiously each day. It is a duty in the early morning to remove or take note of the items on file that must be handled that day; and it is an all-day duty to see that items requiring further attention find their way into the follow-up, pending, or tickler file.

THE SECRETARY'S RESPONSIBILITY TO THE FILES Many records of a company are irreplaceable so that it behooves the secretary to take especial care of those she handles. Before leaving at night, she should see (a) that all folders are in filing cabinets or a vault as a safeguard against fire, and (b) that all files are locked away from the curious eyes of those who might pry if the opportunity presented itself.

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QUESTIONS ON READINGS

1. What types of information are kept in the central files? in the employer's personal file? in the secretary's files?

2. What can the secretary do to secure good relations with the central filing department?

3. When is correspondence ready for filing? In what way is the material marked so that the file clerk knows that it is ready for filing?

4. How is material requisitioned from the central files?

5. In filing, when is an individual folder set up for a correspondent? When is a correspondent's letter filed in a miscellaneous folder? Where are miscellaneous folders placed in the file drawer?

6. What procedure is followed in filing material that may be called for under two or more captions?

7. What is the most important test of a good filing system?

8. A subject file is generally regarded as the most difficult to operate. Why do you think this is true?

9. How do transfer files differ from the current files? How may storage space be reduced?

10. What follow-up methods may the secretary use for filed material?

11. How can a company protect itself against loss of numbered invoices?

12. If on January 12 you transferred all correspondence for the period January 1 to June 30 of the preceding year, what would be your procedure?

DISCUSSION QUESTIONS

1. Suggest situations in which each of the following types of files would be advantageous:

alphabetic	Soundex
numeric	visible index
subject	tub or rotary
geographic	chronological

2. Which do you favor: (a) the substitution card, (b) the out guide, or (c) the requisition card which doubles as an out card? Why?

3. Upon what factors does the decision as to the length of time to retain materials in the files depend?

4. In some offices the secretary sends a tickler to the file clerk when she returns to the central file material that she will need at a future date. Other secretaries prefer to keep the tickler themselves and requisition the material from the central files when they need it. Which method do you think would result in the greater efficiency?

5. Not all business papers need to be filed. Give an example of a business letter or a business paper that you think it would be unnecessary to file.

6. For what purposes other than filing may the secretary make use of the rules for alphabetic indexing?

7. Personnel files are kept in your department. A secretary in the Accounting Department asked for the record of an employee

who left your company two years ago. Your dead files are in the basement. Would you offer to get it for her, or would you tell her where to find it?

8. If your predecessor had not set up a workable filing system, would you start immediately to design a new system, or would you try to improve the existing system until you learned more about the company's business?

9. All correspondence relating to each client is kept in a separate bound file. When your employer asks for the file on a certain client, it is not in its place in the file drawer or on your desk. Later you find it on your employer's desk while he is away for a few moments. Would you tell him where you found it?

PROBLEMS

1. The following telephone calls frequently go out from your office:

(a) Calls to salesmen with headquarters in 100 different cities.
(b) Calls to members of the Kiwanis Club.
(c) Calls to members of the Chamber of Commerce.
(d) Calls to 50 manufacturers from which your plant buys materials.
(e) Calls to presidents of various chapters of the National Office Management Association. (Your employer, Mr. Thomas, is regional director.)
(f) Calls to service repairmen for all office machines.
(g) Calls to office supply houses and printing firms.

The following letters frequently go out from your office:

(a) Letters to all salesmen.
(b) Letters to members of the Kiwanis Club and the Chamber of Commerce.
(c) Letters to all NOMA chapters in the district.
(d) Letters to manufacturers producing materials for the plant.
(e) Letters to members of Mr. Thomas' family and personal friends, who live in various cities.
(f) Letters to hotels in various cities visited by salesmen.

The following remittances, notices, and follow-ups are made weekly or monthly:

(a) A weekly notice to Kiwanis members informing them of the weekly luncheon meeting. (Notice is sent on Monday for the Friday meeting. Members not replying are followed up by telephone on Thursday.)
(b) Payment of insurance premium on the 25th of each month, rent on the 10th, mortgage amortization on the 1st.
(c) Travel expense report is due by the 15th of the month.

Prepare a report indicating the exact form in which each of these records would be kept and where you would keep each record.

2. The purpose of this problem is to give you practice in indexing and alphabetizing names of different types so that you will have a better understanding of the rules for alphabetic indexing. You will need sixty 5 x 3 file cards.

(a) Type or write each of the following names in index form at the top of the file card. Place the number of each name in the upper right-hand corner of the card.

(b) Arrange the cards in correct alphabetic order.

1. Nordell, Inc.
2. Eck Sandwich Counter
3. National Park Service
Dept. of Interior
U. S. Government
4. Acacia Mutual Insurance Co.
5. Mt. Carmel Welfare Center
6. Jas. Le Doux
7. South Eastern Carloading Co.
8. Department of Health
City of Rockdale
9. A & B Welding Co.
10. 19th Hole Restaurant
11. Walter-Woody, Attys.
12. C. C. Walter
13. Adam Salter
14. Paramount Shops, Inc.
1000 East McMillan
Cincinnati, Ohio
15. A 1 Letter Service
16. Edith Marie Beauty Shoppe
17. KDKA Radio Station
18. Bureau of Nursing Service
City of Birmingham, Alabama
19. Town of Ft. Mitchell
20. Wm. Walter
21. Employment Service
Dept. of Labor
U. S. Government
22. Phillip St. Clair
23. John W. St. Clair
24. Bureau of Public Relief
City of Rockdale
25. Paramount Shops, Inc.
918 Glenway
Cincinnati, Ohio
26. A B Furniture Co.
27. Jerome Rice Newman
28. La Mode Frocks
29. G. Laderman
30. East Hyde Park Market
31. Edith's Dancing Studio
32. Advance Laundry
33. Paramount Shops, Inc.
Elder and Race
Springfield, Ohio
34. Commission of Public Utilities, City of Rockdale
35. South Norwalk Delicatessen
36. Civil Aeronautics Authority
Dept. of Commerce
U. S. Government
37. Carl Walter
38. Anna Sailor
39. Paramount Shops, Inc.
2719 Erie Avenue
Springfield, Ohio
40. Dr. S. F. Newman
41. Rev. Wm. J. Lekwin
42. J. A. Eckerle
43. Ad-Sales Corp.
44. Mountain Valley Water Co.
45. Newman-Rice Institute
46. B. A. Walterman

Capital Cleaners	Jackson, Miss.	$ 15.00
Henry Kemper	Montgomery, Ala.	75.00
Splendid Cleaners, Inc.	Savannah, Ga.	90.00
Brown Hotel Cleaners	Lexington, Ky.	60.00
Globe Hatworks	St. Petersburg, Fla.	45.00
Superior Dry Cleaning Co.	Spartanburg, S. C.	15.00
Mayflower Cleaners	Louisville, Ky.	45.00
Victory Dry Cleaning Service	Charleston, W. Va.	30.00
Alpha Service	Macon, Ga.	105.00
Young's Valet Shoppe	Tampa, Fla.	45.00
Rex Dry Cleaner	Orlando, Fla.	45.00
Holland Cleaners	Charleston, W. Va.	90.00
Quality Service Co.	Columbus, Miss.	90.00
Eugene White	Norfolk, Va.	75.00
Atlas Cleaners Co.	Tuscaloosa, Ala.	30.00
Harry Sherman	Charleston, S. C.	120.00
T. J. Noonan	Columbus, Ga.	30.00
Favorite Cleaners	Richmond, Va.	45.00
Brandt Quality Cleaners	Jacksonville, Fla.	$150.00
C-W Quality Cleaners	Birmingham, Ala.	75.00
Progress Laundry	Roanoke, Va.	75.00
A. C. Brook Dry Cleaners	Louisville, Ky.	75.00
Dun Well Dyers	Vicksburg, Miss.	30.00
Acme Cleaners	Parkersburg, W. Va.	75.00
Wuerdeman's	Pensacola, Fla.	60.00
Sterling Laundry Service	Birmingham, Ala.	30.00
Clean Rite Laundry Co.	Savannah, Ga.	90.00
Cottage Dry Cleaners	Norfolk, Va.	165.00
Nu-Way Cleaners	Jackson, Miss.	45.00
A B C Cleaners	Huntington, W. Va.	75.00
4th St. Cleaners	Tampa, Fla.	90.00
Frank Wiley	Meridian, Miss.	30.00
De Luxe Dry Cleaning Shop	Columbia, S. C.	45.00
Kay's Dry Cleaning, Inc.	Biloxi, Miss.	60.00
Spic & Span Dry Cleaning Co.	Paducah, Ky.	15.00
Modern Cleaners	Covington, Ky.	45.00

B. Preparing a Letter for Filing. Mr. Simpson dictates the following letter. He then tells you to follow it up in ten days with Form Letter 6 if the account is still unpaid. If no action has been secured in twenty days, you are to send Form Letter 9.

Mr. Simpson then says that he has a vague remembrance of a *Mr. Lloyd in Cedar Rapids or Muscatine who formerly dealt* with the company and had a bad credit record. He asks you to get any information available from the central files about such a person.

(1) Type the letter and one carbon copy in good form so that you can prepare the carbon copy for filing.

(2) Cross-reference the letter if necessary.

(3) Release it for filing.

(4) Make the necessary tickler file notations.

(5) Requisition materials from the central files.

(The carbon copy of the letter and the forms are in your workbook. If the workbook is not available, type the letter and draw up the necessary forms.)

CONTINENTAL PRODUCTS
320 Euclid Avenue
Des Moines 7, Iowa

July 18, 195-

Mr. Albert C. Lloyd
310 North Tenth Street
Waterloo, Iowa

Dear Mr. Lloyd:

On June 4 you wrote us that you had purchased the A. J. Smithfield business in Waterloo and that you would assume all of his obligations. At that time Mr. Smithfield owed us $36.15 on Invoice No. 8162. On June 13 you gave our representative in your territory, Mr. J. T. Broaduss, an order for $42.81. The terms on the invoice were 2/10, n/30.

Since the old bill incurred by Mr. Smithfield is now sixty days past due and your own commitment of $42.81 remains unpaid, we are wondering if something is wrong. We know, Mr. Lloyd, that you realize the importance of establishing good credit relations with all of the companies from which you make purchases.

Won't you write us at once, either enclosing your check for the two invoices or letting us know what we may expect from you in the way of payment. If you will address your letter direct to me, you will save time in getting your credit record in good shape.

Very truly yours,

CONTINENTAL PRODUCTS

Robert L. Simpson
General Manager

RLS:a

PART III

SECRETARIAL PHASES OF COMMUNICATION AND TRAVEL

CHAPTER 10

ACTING AS RECEPTIONIST

YOU will enjoy your work as a receptionist. It is the spice of the secretary's day, providing opportunities to "meet the public." As a gracious receptionist you will be a valuable asset to your employer. Your courteous actions and diplomatic treatment of callers will create goodwill for both him and his organization. In reality you are his office hostess—a role that is discussed in the first half of this chapter.

The second half of the chapter deals with an equally important part of the receptionist's work—that of scheduling appointments with outside callers and co-workers so that the employer can make the most effective and efficient use of his time.

The Office Hostess

In your capacity as office hostess for the employer, *your every action reflects upon him and his organization*. The employer assumes that you will maintain for him and the business a reputation for cordiality and service. The reaction of callers to his secretary is either a business asset or a liability. Even though a visitor may be denied access to him, the caller should leave the secretary's presence with the feeling that he has received courteous and considerate treatment.

Handling office callers well requires good personality traits: diplomacy, poise, patience, and resourcefulness. The secretary must know what to do and must be able to do it pleasantly and in a reasonable length of time. This calls for:

1. Understanding of human nature and ability to handle all types of people
2. Ability to gain all necessary information from callers and to make intelligent decisions
3. Ability to give considerate attention and to remain courteous under all circumstances

4. Ability to curtail timewasting to a minimum with no loss of goodwill

All the many desirable qualities and traits discussed and emphasized in the personality chapter are as necessary in meeting people from outside the business as in getting along with those within the organization.

THE EMPLOYER'S PREFERENCES When you take up your duties in a new position, you should discuss with your employer his wishes and preferences about visitors—whether or not he wishes to see everyone who calls; who should receive preference; whether he wishes to see salesmen at certain times only; what personal friends may call and how he wishes them handled; whether preference is always to be given to those with appointments, as is usually the case; the names and the positions of influential people who may be admitted without appointments; how he wishes visitors to be announced or presented to him; what his preferences are about appointments, records of calls, and reminders to him regarding them; and how he wishes your help in tactfully terminating the visits of those who stay unnecessarily long. His wishes will govern your procedure.

GREETING THE VISITOR When a caller comes up to your desk, you must learn who he is and what he wants. Smile and greet him with a friendly "How do you do? May I have your name?" or "Your name, please? Whom do you wish to see?" and perhaps, "What company do you represent?" or "What do you wish to see Mr. Lane about?" Get his name and business affiliation, which usually will explain the purpose of his visit, or have him tell you the reason for his call. If he does not give you his business card, write on your daily calendar his name and the reason for his call. Then copy the caller's name and other facts on a slip of paper and take it to the employer. The memorandum will help the employer to remember and use the caller's name in conversation in case he is a stranger.

A valuable business asset to any secretary is her ability to remember names. You can train yourself to remember a person's name by repeating it when you first learn it and by using

it when addressing the person; by recording it—perhaps in a reference notebook or in an appropriate card file; and by associating the name and the face with the kind of business the caller represents.

To hear one's name is a very subtle compliment to which each of us is susceptible. Nothing is so annoying, however, as to hear one's name incorrectly pronounced. If in doubt, ask the person to pronounce it.

REGISTERING CALLERS In some offices the secretary who acts as receptionist must register each caller by recording such items of information as the caller's name, his business affiliation, his business address, the name or the title of the person upon whom he is calling, and the purpose of the call. A printed columnar form known as a *register of callers* is used each day. The caller may be asked to write the information about himself on a line of the form, or the secretary may secure the information by interrogation, writing the data on a pad of paper as she talks with the visitor. Later she can transfer the information to the register. If the caller presents his business card, then, of course, the secretary need only inquire about the name of the person upon whom he is calling and the purpose of his call.

REGISTER OF CALLERS Thursday - August [illegible], 195-

TIME	NAME AND AFFILIATION	PERSON ASKED FOR	PERSON SEEN	PURPOSE OF CALL
9:30	H. Arnold - Acme Lighting Fixt. Co.	B. G.	✓	Salesman
10:30	L. Crowe - Standard Plumbing	R. P.	✓	"
11:45	C. Apple - Contr. on Merrill Bldg.			
	for lunch appt.	B. G.	✓	[illegible]
1:40	T. Nichols - Elmwood Consultant	B. G.	R. P.	[illegible]
3:50	Messenger from [illegible]	—	—	[illegible]

REGISTER OF CALLERS

This is a ruled form for daily use on which the secretary registers the data about each caller.

Daily registers are used in professional offices, such as those of lawyers or public accountants, because such men usually prepare periodic time reports as a basis of computing costs of services rendered to clients. The register serves as a check list for each period to make sure that the time spent with each

client, as recorded on the secretary's register, is also entered and charged for on the executive's time report.

Some employers prefer that an alphabetic card file of callers be kept. In this system the secretary prepares a permanent card for each new regular caller, recording his name, affiliation, purpose, and date of visit. She records subsequent visits as they occur. The file is usually kept by callers' names, and cross reference cards are inserted to show the affiliation names. Doctors use the card system as a basis for billing patients and as a record of each patient's medical data. Purchasing agents use it because it is difficult to remember the correct names of all of the products and the salesmen; for them the file is an efficient memory help.

WHO SHALL PASS? If your desk is placed inside the employer's office, callers are inclined to go direct to the employer, the screening having been done at the receptionist's desk in the outer office. But if your desk is just outside the employer's private office, you will probably be responsible for determining who shall pass.

Common sense will tell you that certain people can always enter the employer's office without first obtaining your permission. Such persons are the top executives, to whom the employer is responsible, and their secretaries; coexecutives, with whom he frequently confers, and their secretaries; and his immediate staff. However, it frequently happens that even these persons inquire of the secretary if she thinks it is convenient for them to go into the employer's office.

The employer's personal friends and family may have the privilege of going into his office at any time; but if the employer is busy at the moment, the secretary should ask them to wait, telling them that he is busy. She should not go into detail, such as "He is in conference with the general manager" or "He is talking with the cashier." A statement that he will be free in a few moments or will return shortly is ample explanation. Learn to know these callers and always try to call them by name. Be friendly with them, but not too personal, because they are the employer's friends, not yours.

As to callers from the outside, the secretary cannot set herself up as an absolute arbiter of who shall and who shall not

pass the employer's door. The rule is: Whenever in doubt, find out from your employer whether he wishes to see the visitor. The caller's business will usually be the deciding factor in whether he is to see the employer at once or at all.

Clients and customers are always accorded cordial and gracious treatment. Salesmen of materials and services of the types used by the business are treated with courtesy and listened to attentively. A salesman of this kind very likely has had technical training regarding the use of his product and often can help in ironing out the employer's problems. The secretary should inform the employer immediately when such a salesman calls.

If the secretary has reason to believe that her company would have no use for the salesman's product, she may say, "Mr. Jones, I don't believe we would be able to use your product, but let me check with Mr. Lane and see if he wants to talk with you" or "We are using another product, and I am not sure that Mr. Lane, my employer, has time to see you today, but I will ask him. Just a moment, please." She can then ask the employer his preference and inform the salesman of his decision.

The secretary should not judge a caller's importance by his appearance. Some outstanding people in the artistic, professional, and industrial world are far from prepossessing in appearance. On one occasion a secretary decided that an early-morning, very ordinary looking man was quite unimportant and did not even trouble to announce to her employer that the man was waiting, as her employer happened to be busy at the moment. Finally, the man grew impatient and left. Later she learned that he was the president of a large business who had come to offer her employer a high position in his company.

TROUBLESOME CALLERS There are times in every secretary's life when being courteous to certain visitors requires considerable will power and restraint. Most callers are easy to greet, but a few are troublesome. Some of them are gruff; some are condescending; some are self-important or aggressive; some are even rude. It is very difficult to be gracious to these persons.

The caller who resorts to obvious flattery to get information from a secretary is very obnoxious. He is usually thick-skinned,

three duties. The third is admitting the caller to the employer's office. If it is an exceptionally long wait, you may go in and remind the employer that the caller is still waiting. You can then report to the caller that it will be only a few more minutes. When signaled by the employer, you may merely nod your head to tell the caller he may now go into the employer's office. Sometimes the employer walks out to greet the caller. Should there be two waiting, you will indicate who is first. If you escort the caller into the private office, be certain first that all work at your desk is under cover to shield it from roving eyes while you are away.

INTRODUCTIONS To introduce a caller, such phrases as "May I present Mrs. Harvey?" or "May I introduce Miss Jenkins?" or "This is Mr. Weston," are acceptable; "Mr. Lane, meet Miss Adams" is not. In an office, business position rather than sex or age is usually the determining factor as to who should be introduced to whom. The secretary presents customers or clients to her employer.

In an office the social rule is reversed and an employer presents his secretary to a man with, "Mr. Hudson, I should like to introduce my secretary, Miss Evans." The secretary usually does not rise or shake hands when she is introduced unless the other person offers to shake hands. She acknowledges an introduction by the usual, "How do you do?"

TERMINATING VISITS Some callers stay and stay and stay. Usually the employer arises when he wishes to terminate a conference, but occasionally a caller will not take the hint. The secretary may help the situation by taking to the employer's desk a note which he can "pretend" contains a request for him to go elsewhere, or by reminding him that it is time for him to leave for his next engagement. She should not say where, even though it is a legitimate reminder. She might even telephone from a desk out of range and ask if he wants to be interrupted so that he can send the person away. Often his mere answering of the telephone affords a sufficient break in the conversation to make the caller realize he has stayed overlong.

Appointments

Appointments are made while the caller is in the office or by correspondence, telephone, or telegram. The employer may be out when a caller drops in and requests a definite appointment; or, during the course of a conference, the employer may ask the secretary to schedule another appointment for the following week; or a request for an appointment from an out-of-town caller may come in by mail.

It is vital that the secretary obtain full and complete information in making appointments and have a complete record so that there will be no confusion in either her calendar or that of the person to whom the appointment is given.

APPOINTMENT RECORDS An employer whose field of work necessitates numerous appointments usually has a specially bound appointment book containing ruled pages for the business days of the week. If his appointments are relatively few in number, he uses his daily calendar pages instead of a special book. In either case the secretary enters the scheduled appointments, and the personal and business items requiring action, on the page provided for the date in question.

On her own daily calendar the secretary keeps a duplicate record of the appointments scheduled for that day.

GRANTING APPOINTMENTS In scheduling appointments, the secretary turns journalist and concerns herself with the "W's"—who, what, when, and where; that is, she finds out *who* the person is—his name and affiliation; *what* he wants—an interview for a position, an opportunity to sell his product, or a business discussion of some sort; *when* he wants to come in to see the employer and how much time he wants. If the appointment is being arranged at a place other than the employer's office, the *where* of it will have to be determined also.

In granting appointments, the secretary should consider the personal preferences of her employer. Here are some factors that the secretary should consider before selecting the date and hour:

(1) Avoid making appointments on the first day after the employer's return from an absence of several days because there is usually an accumulation of work to be cleared away.

(2) Avoid appointments just prior to a trip or vacation because of the last-minute rush of work.

(3) Schedule the first appointment of the day only after ample time has been provided to take care of the morning's mail.

(4) Avoid appointments in the late afternoon when everyone is hurrying to finish the work of the day.

(5) Do not schedule appointments on Monday mornings, if this is the employer's preference, because there is the week-end accumulation of mail that requires attention.

(6) Schedule intraorganization appointments for one half of the day only so that the other half will be free for outside appointments, if your employer follows this policy.

(7) Avoid appointments on Saturday morning if the office is regularly open because everyone is trying to do as much work as possible in a few hours and appointments may not get full attention.

When the secretary schedules an appointment, she should make it clear that it is subject to the approval of the employer; and she should promise to inform the caller promptly if another time has to be selected. She should always enter the appointment on her own calendar, as well as in the employer's appointment book or on his calendar. Unless the secretary has been given *carte blanche* in scheduling appointments, she should type a note explaining the appointment and asking the employer to approve the time set.

There is an opportunity for the secretary to show real judgment in arranging appointments. A young man from Wisconsin planned to come to an Ohio city to apply for an engineering position. He wrote to the prospective employer and said that he would come to his office the following Saturday morning, making the trip by train. The employer was in West Virginia at the time the letter was received, but he was expected to return to his office on the Saturday morning in question. The

secretary was concerned over the long trip the applicant would be making at his own expense. She knew her employer expected to be in a near-by Wisconsin city the following Monday and felt the interview might be held there; so she telegraphed her employer to ask his opinion. He wired back to arrange for the appointment at his hotel any time after seven o'clock on Monday night. Thus, the applicant saved a great deal of expense and time, and the employer had his Saturday morning free to handle the work on his desk. Besides, he did not feel obligated to employ the boy because he had gone to a great deal of trouble and expense to apply for the position.

REFUSING APPOINTMENTS Obviously appointments should be refused as diplomatically as possible. Refusals should be prefaced by a sincere, "I'm very sorry, but . . ."; and a logical reason should be given, such as "Mr. Sims is out of town," or "Mr. Sims does not see anyone on that matter," or "The day is all booked." These are all plausible reasons and much kinder to the ear than "Mr. Sims won't see you."

For other tactful refusals one might say that the employer is in conference, that he must attend a meeting on that day, that he has a very heavy schedule for the next two weeks, or that he is getting ready to leave town. There is always a good reason for refusing an appointment; and as you work at your desk such reasons will become a part of your stock in trade. If a caller seems very much disappointed over a refusal, you might offer to talk with him yourself and relay the message to the employer.

KEEPING APPOINTMENTS The secretary will be on the lookout for the person who has an appointment. She will announce the person as soon as he arrives and may talk with him casually if there is a delay. If a person is late, it is entirely proper for the secretary to telephone to see if he is on the way. If there is any correspondence or data that will be helpful in the conference, the secretary should have them ready or, better, submit them to her employer before the appointment so that he will be familiar with the matter to be discussed.

REFERENCE READING

CARNEY, MARIE. *Etiquette in Business.* New York: McGraw-Hill Book Company, Inc., 1948, pp. 77–150.

QUESTIONS ON READINGS

1. How would you classify callers in order to facilitate the handling of your duties as receptionist?

2. Should the receptionist's handling of out-of-town callers be any different from her handling of local callers? If your answer is "Yes," state specifically in what respects the treatment should be different.

3. Should the attitude of the receptionist toward a creditor be any different from that toward a debtor?

4. When you assume your duties in a new position, what points regarding visitors should you take up with your employer?

5. What purposes are served by the register or card file of callers?

6. What items of information should be recorded on the appointment records?

7. Assume that while your employer is making a call at a business office not far away, an old friend of his from out of town, who has only a few minutes before his train leaves, comes in to see him. What would you do?

8. If your employer makes appointments without informing you about them, resulting in conflicts because you have granted appointments for those same times, what plan would you suggest to eliminate such difficulties?

9. What can the secretary do to assist her employer in preparing for and holding the meeting with callers?

10. In what respects do you think that reception work in the office of each of the following types of businessmen would be different from that of the other offices in the list:

(a) An elected government official
(b) A professional man, such as a doctor or a lawyer
(c) A manufacturer of heavy machinery
(d) A bank executive

11. If you kept a card file of callers at the office, what items of information would you include on the card?

PROJECTS

A. Keeping a Caller's Register. From the information given below prepare a register of the callers who visited your office today. You are secretary to the general manager, Robert L. Simpson, and to his assistant, Herb Gale. Use a form similar to that shown on page 181.

9:15 a.m. Sales representative from Champion Paper Company, Charles Annette, asked for RLS, but talked with HG.

9:30 a.m. Delivery man brought printing plates from Art Engraving Company for RLS.

9:30 a.m. H. Cooper, commercial photographer, appointment with HG.

10:00 a.m. Representative C. Abbott from local Empire Printing Company came to see HG, who was in conference. CA returned at 2:30 when HG talked with him.

2:20 p.m. High school student, Jim Hughes, to see RLS or HG to solicit advertisement for yearbook. HG talked with him.

2:30 p.m. See Abbott above.

4:00 p.m. Mike Pascal talked with RLS about plans for Advertising Club outing.

B. Scheduling Appointments on a Secretary's Desk Calendar. Rule a secretary's calendar appointment page for October 18, similar to the upper one shown on page 188. The appointments and activities listed below were scheduled in advance for that day. Write up all of the items on the ruled page in brief but clear form. Your employer is Robert L. Simpson.

(1) Mr. Simpson made a luncheon appointment at the Gibson Hotel with R. T. Mason for 12:30.

(2) A letter from J. M. Black, of Philadelphia, requested an appointment at 10:00, which was granted by return mail.

(3) RLS must appoint a committee to handle outing for the Metropolitan Club by the 20th.

(4) You made a half-hour dental appointment for 11:00 a.m. for Mr. Simpson.

(5) Office conference, which employer must attend, is called for 3:15 p.m.

(6) Mr R. H. Fisher telephoned for an appointment and accepted your suggestion to come in for a 20-minute appointment at 2:00 p.m.

(7) Mr. Black wrote that he has found he is unable to keep the appointment scheduled.

(8) Mr Noble, sales manager, requested that RLS come to his office at 9:00 a.m. for a conference.

(9) Mr. Simpson asked you to verify a 2:00 p.m. appointment that he believes he made with H. H. Dodd. Inasmuch as you have scheduled another appointment at 2:00 p.m., you called Mr. Dodd and arranged for him to come at 10:00 a.m.

(10) Mr. Simpson asked you to cancel any afternoon appointments that are scheduled to take place before 2:30 p.m. You called Mr. Fisher and arranged for him to come in at 10:30 a.m.

(11) You are to buy a gift for a shower on your co-worker, Alice Stevens, to be held the night of the 18th.

(12) You are to make a dental appointment for yourself.

C. **Recording Appointments on the Employer's Desk Calendar.** Rule an employer's calendar appointment page for October 18, similar to the lower one shown on page 188. Enter those appointments and activities in Project A that pertain to the employer.

D. **Preparing a Memorandum of Appointments.** Type a memorandum of the appointments scheduled for Mr. Simpson to be sent in with the morning's mail. Use a small slip of paper which he can tuck into his coat pocket and refer to unobtrusively while he is out of the office or in conference. Include two items from your follow-up file: He is to start work on a speech to be given soon; and his daughter Anne has a birthday next Monday.

E. **Canceling an Appointment.** Your employer, Mr. Simpson, has been very eager for a couple of weeks to grant an appointment to S. P. Putman, who is located in a nearby city. A week ago it was necessary for you to write Mr. Putman canceling his appointment because your employer was called out of town by the death of his brother. At that time you scheduled another appointment. It is now necessary to write Mr. Putman canceling his second appointment because your employer has been called to Washington, D. C., to testify before a Congressional committee. Type the body of a cancellation letter that you would write, assuming that it is not possible at this time for you to suggest another time for the appointment.

CHAPTER 11

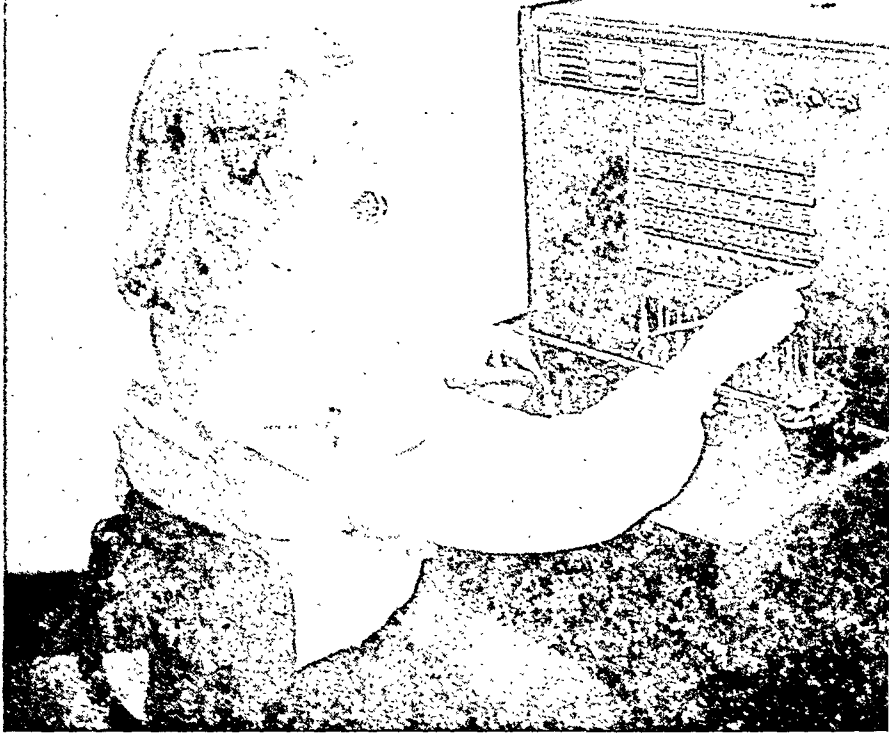
TELEPHONE SERVICES AND TECHNIQUES

IF YOU are out to capture the appreciative goodwill of your employer and the friendly goodwill of your telephone public, develop a pleasant, helpful telephone personality. Again and again an employer will hear about his "excellent secretary" from those callers who have been impressed with her pleasant, helpful manner over the telephone. And when such callers come to the office, they invariably tell the secretary that they are interested in seeing her face to face because she has such a pleasant telephone manner. This may sound like exaggerated propaganda to a student secretary; but if you study the success stories of girls who are the treasured secretaries of celebrities and top executives in the country, you will find they all mention the praise they have received for their telephone personalities, and the resulting appreciation of the employer.

In general terms, a good telephone personality entails being pleasant and helpful to *every* caller—to develop what the telephone companies term a "personal-interest tone." Specifically, it means mastering the techniques of good telephone practices as covered in the topics following.

TELEPHONE VOICE Although you have talked over the telephone many times, you probably have not been concerned with the tone of your voice. In business your voice over the telephone must sound pleasing and friendly, because telephone impressions are formed to a large extent from the sound of the voice.

A telephone ring is an anonymous thing. The secretary does not know who is calling. It may be an important customer, the employer's wife, or the big chief. It is best to assume that the one calling is important and deserves one's best "personal-interest" tone. A voice having this personal-interest tone is pleasant, friendly, cordial, interested, and helpful. A voice lacking this tone is expressionless, timid, indifferent, impatient, curt, or inattentive.



PRIVATE BRANCH EXCHANGE

The operator shown here is plugging in a cord to answer or to place an outside call on a private branch exchange. The board is similar to that used in every large business office. Outgoing calls on this P.B.X. are made by dialing the number wanted.

There is an efficient practice to be acquired too. As you answer the telephone with one hand, pick up a pencil with the other and thus be ready each time to take notes on the pad beside the telephone. The motions of your two hands should be spontaneous and synchronized.

The way in which the secretary responds to a call depends on whether her telephone is connected directly to an outside line or to the company switchboard. If her telephone is on an outside line, she may answer, "Brown and Jeffers—Miss Jones speaking." If the call comes through the company switchboard, she may answer with, "Mr. Brown's office," because the P. B. X. attendant presumably has already answered "Brown and Jeffers." In either case, she does not say "Hello" or "Yes?"—two greetings that signify nothing.

To recognize voices and use names in telephone conversations is a decided personal-interest note that is complimentary to the caller. There is no sweeter music to a person than the

Giving Information to Callers. When your employer is not available for answering the telephone, be very discreet in the information you give the caller. Definite information thoughtlessly given may be exactly what the employer does not want known. Note the differences in the following:

Too Definite	Informative yet Indefinite
He is in conference with our president.	He isn't at his desk this moment.
He has a bad attack of grippe.	He is away from the office for a day or two.
He is in New York on business.	He is out of the city today.
He left early this afternoon to play golf.	He won't be back this afternoon.
I can get in touch with him in Mr. Bray's office and have him call you.	I think I can reach him by telephone. Shall I have him call you?

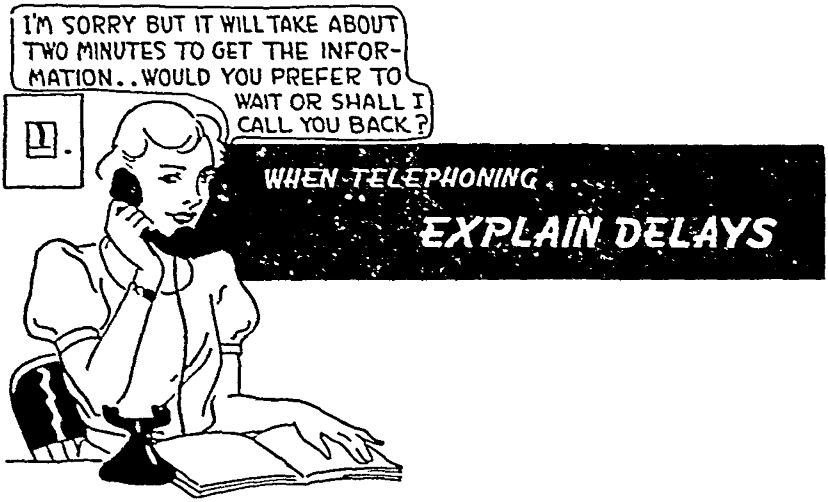
If you are asked a direct question and are uncertain as to whether you should give the answer, offer to find out the information and call back. This gives you an opportunity to get the opinion of a person in authority.

Taking Messages. When your employer is out and you answer a call for him, always offer to take a message. By following the practice recommended, you will already have your pencil in hand when you answer the call so that you can take down the message as it is given. Repeat any details of the message of which you are in doubt. Write the date, the time the call came in, the name and identity of the caller, the message, and the number to be called back. Some firms use a small ruled form for taking telephone messages; other expect the secretaries to use small slips of paper. In either event write down every call received even if it is not necessary for the employer to call the person back. Do not rely on your memory to tell him about it. Make out a slip for him for each of the calls you answer while he is away.

One secretary was very careful to write out the details of each outside local call she answered while her employer was out of the city for the day. But she didn't think it necessary

A positive answer to any of these questions necessitates the caller's divulging his name or the purpose of his call.

Hold the Line, Please. When it is necessary to leave the telephone while the caller waits, make sure that he understands what you are doing and gives his consent. If you have to consult records not at your desk, you might say to him, "Will you hold the line, please, while I look at our records?" Listen for a second to see if he is agreeable and then lay the receiver down gently. If there is any considerable delay in returning to the telephone, say, "I am sorry to have kept you waiting, Mr. Thompson," or "Thank you for waiting, Mr. Thompson."



A novice in secretaryship wanted to do everything well—and fast. She answered the telephone and rushed away to call the person wanted, but she was in such haste that she thrust the receiver down with a jar on the desk before hurrying away. You can imagine the punishment to the caller's ear. Take time to lay the receiver down carefully. Replace it gently when the call is completed. To terminate a call by banging a receiver is equivalent to slamming a door as a visitor leaves your office.

If you ask your caller to wait for your employer to become available, as when he is talking on another telephone, report to the caller at frequent intervals if the waiting period is longer than you expected it to be.

Transferring Calls. In a big firm calls must frequently be referred to other persons. In such a case the secretary courteously asks the caller to hold the line while she transfers the call. She may say, "I think you want to talk with Mr. Jones. Will you please hold the line while I transfer the call." She then "flashes" the P.B.X. attendant by depressing and releasing the receiver hook or bar slowly, about twice a second. This causes a light to blink on the switchboard, notifying the attendant that she is wanted on the line. If the receiver hook or bar is moved up and down too rapidly, there is no intermittent flash at the board and consequently no signal to the attendant. Hurried jiggling of the hook hinders rather than helps the transfer of calls. After the attendant plugs in and acknowledges the signal, the secretary says, "Please transfer this call to Mr. Jones."

Be certain that the person understands that the call is being transferred. Also be sure that the person to whom it is being transferred can really help the caller. If you are not positive, it is preferable to offer to find out the information yourself and to call back.

OUTGOING LOCAL CALLS The information pages in the front of the telephone directory explain the correct procedure for placing calls and answer many questions regarding the various telephone services. The following information supplements that found in typical directories.

Finding Numbers in Telephone Directories. Inasmuch as the names in telephone directories are arranged alphabetically, most secretaries feel that there is no particular problem involved in locating numbers. As a result such persons have never taken the time to study the particular system of alphabetizing and cross indexing that is used in telephone directories. Their efforts to find certain numbers follow a haphazard, hit-or-miss plan rather than an efficient, businesslike procedure. The number of requests received by the information operators of telephone companies for numbers that are listed in the directories indicates the need for a better understanding of their organization.

The Classified Directory. If the secretary knows the type of business or profession of the person or the company whose num-

Air Conditioning Equip & Supls (Cont'd)

Short Wm W Co Inc 274MadisonAv-MUryhil 9-0880
Simon's Refrigeratn Equip Co 763 1Av-MUryhil 4-4129
Somers Permanent Filter Co 8W40-LOngacr 3-4280
Standard Refrigeratrs Inc 578 2Av-MUryhil 5-6978
Thermal-Air 350W14 ----------WAtkns 9-8159

THERMODYNE CORP·THE
EXCLUSIVE
CARRIER DISTRIBUTOR
COMFORT & INDUSTRIAL AIR CONDITIONING
COMMERCIAL REFRIGERATION
635W51 ----------------COlumbs 5-4576

TILTZ AIR CONDITIONING CORP
30Vesey ----- ---- COrtlnd 7-4309

TRI-BORO REFRIGERATION SERVICE INC
Installation of Commercial Refrigeration and Air Conditioning Equipment
25-12 49 LICity ----------AStora 8-0603

TUTTLE & BAILEY INC
50Church - --------BEekmn 3-0020

Air Conditioning Equip & Supls (Cont'd)

WATERLOO REGISTER CO
274MadisonAv -----LExngtn 2-8393

WESTINGHOUSE AIR CONDITIONING
Air conditioning & refrigeration equipment for home, business or industry—from the smallest to the largest. "Packaged" and engineered installations—a complete line.
Westinghouse
Sturtevant
DIVISION

"WHERE TO BUY THEM"

DISTRICT OFFICE
WESTINGHOUSE ELECTRIC CORP
420LexingtonAv ----MUryhil 6-2740

CONTRACTORS
ABBOTT LESTER & CO INC
140Cedar ----------BArcly 7-8760
TILTZ AIR CONDITIONING CORP
30Vesey -----------COrtlnd 7-4309

DISTRIBUTOR
TIMES APPLIANCE CO INC
353 4Av ------MUryhil 6-8900

White-Rodgers Elec Co 30Chrch ---BEekmn 3-7348

PORTION OF A CLASSIFIED DIRECTORY PAGE

This illustration shows in alphabetic order the business houses that carry air conditioning equipment and supplies. Trade-named and trade-marked equipment and supplies are listed in their proper alphabetic location with the names of the supplying concerns printed underneath. Every business telephone is given one free lightface type listing under any classification desired. Other listings are charged for at set rates.

ber she is seeking, she will frequently save time by using the classified directory instead of the alphabetic directory. The basic arrangement of this type of directory, which may be separate from or a part of the general directory, is an alphabetic listing of the types of businesses or professions. In other words, it is an alphabetic arrangement of subject headings. Under each of these headings, names of subscribers are arranged alphabetically. If the secretary is seeking the number of a wholesale lumber dealer by the name of *Smith*, it is much simpler for her to locate this information in the classified directory than in the general directory because of the fewer Smith surnames that she will have to examine under the heading *Lumber, Wholesale.*

The use of the classified directory involves the following:

(1) An understanding of the subject headings used. The secretary should know, for example, that the telephone num-

bers of Federal Government offices may not be listed in the classified directory.

(2) The use of the alphabetic captions at the top of each page. When the secretary is looking for a particular subject, it is a waste of time for her to look at the subjects on each page as she turns the pages. By examining the alphabetic captions at the top outside corner of the page, she can tell immediately whether the subject that she is seeking is to be found on that page or whether she needs to turn forward or backward in the directory.

(3) The use of cross reference notations. If the secretary is seeking the number of a certified public accountant, for example, and looks under the heading *Certified Public Accountants* or *Public Accountants*, she may be referred to the heading *Accountants*.

The classified telephone directory can be used to locate firms that are only vaguely remembered. The secretary may be requested to call a certain office supply shop, the name of which cannot be recalled. The shop may be remembered as "next door to the Strand Theater" or by its street address. It is not difficult to scan the list of office supply stores to locate the one on the remembered street. Sometimes a business firm is remembered only by its slogan, the proprietor's name (if it differs from the firm name), or the brand of product it sells. Many businesses use these identifications in their classified directory advertising.

Since the classified directory is a complete list of business and professional people having telephone service in the city, it can be used to considerable advantage when supplies and services are required and there has been no contact with anyone in that line of business. Ordinarily the employer will have regular sources for the firm's supplies and services, but occasions will arise when the secretary will be called upon to select a firm with which to deal. For instance, it may be decided to install a water cooler in the office and the employer, not knowing who sells water coolers, requests the secretary to get in touch with some firms and have them send their representatives. People in this line of business may be found under the heading of *Water Coolers*. Many firms also buy advertising space in the classified directory in order to give details about the products they sell

and the services that they render. This additional information will usually be found helpful in selecting firms that are in a position to supply the kind of service desired.

The Alphabetic Directory. In the alphabetic directory, all names are listed alphabetically regardless of business or occupation of the subscriber. In general the alphabetic arrangement is based upon the same rules for alphabetic indexing that are used in filing. The parts of each listing are considered in this order: name, business or residence designation, street name and number. The arrangement in the directory may differ in a few respects from an arrangement that would result from using the filing rules. The following differences may be found:

(*a*) *Apostrophes.* Apostrophes indicating either singular possessives or plural possessives may be ignored so that in the name *Johnson's Delicatessen,* the final *s* in the first unit would be considered.

(*b*) *Organizations.* Names of churches, schools, clubs, and similar organizations may be listed according to the first word (other than *The*) rather than according to the word that is most important or that most clearly identifies the organization. Thus, First Congregational Church would be listed according to the words in their natural order; whereas in filing, the second word would be used first so that if there were several churches of the same denomination they would be listed together.

(*c*) *Titles and Seniority.* Personal titles such as *Miss* or *Mrs.* (*Mr.* is not used), professional titles or degrees such as *M.D.* and *D.D.*, and seniority designations such as *Jr.* and *Sr.* may be considered, but only in determining the order of names bearing these titles or designations in relationship to other names that are identical in other respects. In the following examples note that in the first group the abbreviation *Jr.* at the end of the second name determines its position in relationship to the first name but is not considered in determining its position in relationship to the third name. Likewise, in the second group the personal title *Mrs.* at the end of the second name is considered in determining its position in relationship to the first name but is not considered in determining its position in relationship to the third name.

Smith Wm	Smith Chas
Smith Wm Jr	Smith Chas Mrs
Smith Wm C	Smith Chas A Sons

(*d*) *Streets.* When subscribers' names are alike, they are listed alphabetically by street names ignoring house numbers and such words as East, West, North, and South unless two names are also identical as to principal street names. Numbered streets follow named streets in numerical order.

Johnson A 54 Hillside Pl	Johnson A 32 Rutgers
Johnson A 147 E Oliver	Johnson A 23 N 4th
Johnson A 119 W Oliver	Johnson A 182 S 8th
Johnson A 25 Rutgers	Johnson A 326 N 14th

The location of surnames that are commonly spelled in more than one way is facilitated by a system of cross indexing that is used in many large directories. For example, if the secretary is attempting to locate the telephone number of George Behr but does not know how the surname is spelled, she may look first in the list of names with the surname *Baer*. Not finding the name she is seeking in that group, she can refer to the cross reference line immediately preceding the first name of the group and find information similar to the following:

BAER, See also Baehr, Bahr, Bair, Bare, Bear, Behr.

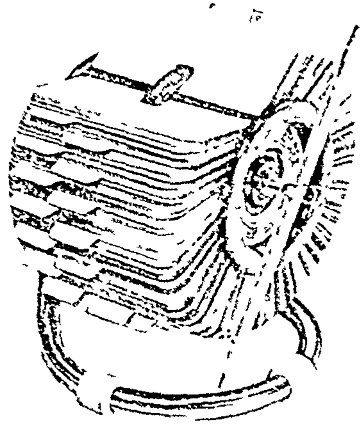
Similarly, if the secretary is looking for the number of one of the public schools, she may look first under *Schools, Public,* or *Public Schools* and find instructions to refer to the listing of *Board of Education.*

When the secretary finds the number she is seeking in the directory, she should encircle or check the number and copy it on a slip of paper, because she can place her call more conveniently and accurately by referring to such a note than by referring to the small print on the page of the directory. Furthermore, the separate record is a timesaver if the secretary gets the busy signal on her first attempt to complete the call and finds it necessary to call again. Marking the number on the directory page makes it easier for her to locate the same number in the future.

When a number cannot be located in the directory, it can be learned from the information operator. After obtaining the

number, the secretary should write the name and the number at the top of the proper page in the alphabetic directory so that the information will be on record when it is needed again.

Personal Telephone List. One employer said that when he asked his secretary to get Mr. Martin, of Potter, Tyler, and Martin, he expected her to remember from then on how to reach Mr. Martin. To assist her in remembering such affiliations and telephone numbers, every secretary keeps a personal up-to-date telephone list. In it she lists alphabetically the names of persons and firms frequently called and their telephone numbers. A thoughtful secretary types a condensed list of such numbers for the employer and places it under his glass desk top, at the back of his daily calendar pad, or inside his office directory of extension numbers. Booklets in which to list numbers frequently called are supplied on request by many of the telephone companies. One of the mechanical indexes, however, is preferable if there are numerous names to list.



Wheeldex Manufacturing Co.

TELEPHONE NUMBER FILE

As many as a thousand addresses and telephone numbers may be kept on individual cards on a small portable wheel card file.

Special Local Services. Some of the larger cities offer special local telephone services. For example, you can find out the exact time by calling the Time Bureau. In some localities this service is handled by the telephone company and may or may not be charged for at a nominal rate. In some cities the time service is given free by an advertiser, who has the operator give a brief selling message before the time is stated.

Similarly weather forecasts can be obtained in some cities from a Weather Bureau. An employer who flies his own plane may have the secretary call for these forecasts frequently.

Placing Local Calls. You will be required to place two kinds of local calls: (1) calls for the employer so that he can

talk with persons on his extension, and (2) your own calls. In the first, you must get the number desired, identify your employer as the caller, and ask for the person whom the employer wishes to talk with, saying something like, "Mr. Brown, of Harkness Brown Company, calling Mr. Norman." To save the time of the person being called, always let your employer know when you are placing a call for him so that he will be ready to talk when you have established the connection.

If the answering operator or secretary asks you to put your employer on the line before she puts hers on, be gracious and follow her request. Obviously when a secretary places outgoing calls for the employer, either her employer or the person called must waste a few seconds waiting for the other to respond. The time-wasting, "just-a-moment-please" habit probably brought on the "put-him-on-the-line" requests. Often an employer asks his secretary to get Mr. So-and-so on the telephone and then leaves his desk. Let us cite a typical example. Mr. Brown asks his secretary to get Mr. Sheridan and then steps into the next office to speak to another executive. The secretary calls Mr. Sheridan's office, asks for him, and when he answers, discovers that Mr. Brown has disappeared. Since her employer is not at his telephone ready to talk, she must say to Mr. Sheridan, "Just a moment, please. Mr. Brown wants to talk with you." She then puts down the telephone and scurries for Mr. Brown. He returns to the telephone to find that Mr. Sheridan is pretty disgruntled at the delay. If Mr. Brown made this an habitual practice, one could scarcely blame Mr. Sheridan's secretary for insisting that Mr. Brown be put on the line first.

In the final analysis, faster service would probably be obtained if the employer placed his own call and remained on the line until the called person was reached. Even though the employer may in some cases be reluctant to follow such a practice, the secretary can help him get his calls through faster by having him on the line when the called person answers the telephone.

In making your own calls, you will find it sensible to jot down what you want to say before you get the person on the line. Many secretaries list all of the points to be covered in a call to avoid the embarrassment of having to call back for a

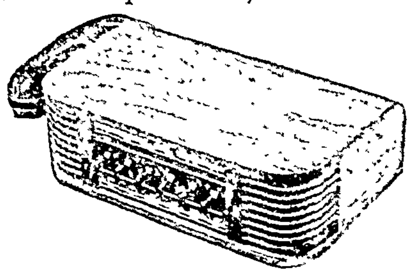
point forgotten. An important call should always be briefed in your mind first. You will find that you will speak with more confidence and a better choice of words and that you will make an altogether better impression by knowing in advance what you are going to say.

The procedure in placing calls varies with the kind of telephone equipment in the office. If the desk telephone is a direct outside line, give the number to the telephone operator or dial it. If the line goes through the office switchboard, ask the P.B.X. attendant for an outside line by saying "Outside, please," or "Outside line, please."

Making a good impression on people whom you telephone is just as important as is making a good impression on those who call at your office. You can do this by introducing yourself properly. Upon being connected, give your own name and, if desirable, your firm name. For example, "This is Miss Davis, of the Harkness Brown Company." A pleasant greeting may be combined with your announcement, such as "Good morning, this is Miss Davis, of the Harkness Brown Company."

In case the person who answers is not the one you want, ask pleasantly for the person wanted. If you have not already introduced yourself, give your name when asking for another person. For example, say, "May I speak with Mr. Norman? This is Miss Davis, of Harkness Brown Company."

INTEROFFICE CALLS On interoffice calls, that is, calls within the organization, the secretary may ask the switchboard operator for a certain department, or a certain person, or an extension number. Very large firms use extension numbers to save the time of employees and telephone operators. They have firm directories that list the names of the departments and individuals having telephone service and their respective extension numbers.



INTEROFFICE COMMUNICATION SYSTEM

This equipment provides direct communication between offices.

TELEPHONE SPELLING When the operator or person called cannot understand certain words, the secretary should spell them. Such words may include the names of persons, businesses, organizations, cities, and technical terms.

Spelling over the telephone is a verbal hazard. The person spelling tries to pronounce every letter very distinctly, and the one taking down the spelled words concentrates and hopes he has heard correctly. To prevent mistakes, any simple, easy-to-understand word can be used to identify a letter. Telephone company operators, who must frequently spell over the telephone, use the following system:

A for Alice	J for James	S for Samuel
B for Bertha	K for Kate	T for Thomas
C for Charles	L for Louis	U for Utah
D for David	M for Mary	V for Victor
E for Edward	N for Nellie	W for William
F for Frank	O for Oliver	X for X-ray
G for George	P for Peter	Y for Young
H for Henry	Q for Quaker	Z for Zebra
I for Ida	R for Robert	

To spell *Besman*, one says, "Besman, B-e-s-m-a-n; *B* for Bertha, *e* for Edward, *s* for Samuel, *m* for Mary, *a* for Alice, and *n* for Nellie."

Western Union operators use the following slightly different system of letter identification:

A as in Adams	J as in John	S as in Sugar
B as in Boston	K as in King	T as in Thomas
C as in Chicago	L as in Lincoln	U as in Union
D as in Denver	M as in Mary	V as in Victor
E as in Edward	N as in New York	W as in William
F as in Frank	O as in Ocean	X as in X-ray
G as in George	P as in Peter	Y as in Young
H as in Henry	Q as in Queen	Z as in Zero
I as in Ida	R as in Robert	

IDENTIFYING NUMBERS When numbers are used in telephone conversations, it is particularly important that the listening party understand them correctly. To many persons the understanding of individual figures is more difficult than that of individual letters. The following method used by telephone operators is suggested for the clearest identification.

0—Oh	—Long O
1—Wun	—Strong W and N
2—Too	—Strong T and long OO
3—Th-r-ee	—Strong R and a long EE
4—Fo-er	—Long O and strong R
5—Fi-iv	—Long I changing to short and a strong V
6—Siks	—Strong S and KS
7—Sev-en	—Strong S and V and a well-sounded EN
8—Ate	—Long A and strong T
9—Ni-en	—Strong N at the beginning, a long I, and a well-sounded EN

RECORDED CONVERSATIONS As discussed on pages 74 and 75, you may sometimes be asked to listen in and take a telephone conversation in shorthand, in other words, to record the conversation. There are also devices that may be purchased and connected to a telephone, which will automatically record the conversation. However, when such equipment is used, the telephone company provides a "recorder connector," which automatically produces a tone warning signal to indicate to all persons on the line that the conversation is being recorded. Whenever you hear a short high "beep" tone repeated about every fifteen seconds, you will know the conversation is being recorded and will thus be forewarned to take special care in what you say.

Long Distance Telephone Services

The quickest means of long distance communication is the telephone. Its web of lines and trained operators make it possible in normal times to connect firms across the country in an average speed of a minute and a half.

TYPES OF SERVICE Of the several types of long distance services, three are commonly used in business offices; namely, station-to-station, person-to-person, and conference calls. The secretary is expected to know when to use each type and the recommended and permissible practices in handling such calls effectively and efficiently.

Station-to-Station Calls. The secretary places a station-to-station call when she is willing to talk with anyone answering

directory. Rates to all other points can be secured from the long distance operator. These rates are somewhat higher than station-to-station rates, but charges do not begin until conversation starts with the specified person. The initial period is three minutes. Reduced night and Sunday rates are in effect between points when the initial rate is over 50 cents.

A person-to-person call places on the long distance operator the responsibility for reaching the person wanted. If asked to do so, she will try repeatedly to complete the call. If the called station is reached and for reasons beyond the control of the telephone company the call is not completed, a small report charge is made on calls between points within certain states.

Appointment and messenger calls are special types of person-to-person calls.

When a particular person is wanted at a designated time, an appointment call is placed. The same information is given the long distance operator as is given for a person-to-person call plus the specific time to put the call through. Insofar as rates and initial and overtime periods are concerned, it is considered a regular person-to-person call by the telephone company.

When a person called has no telephone, a messenger may be used to summon that person to the nearest telephone. The messenger's fee is added to the cost of the person-to-person call.

Which Class of Service? The secretary must often decide whether to use person-to-person or station-to-station service. She can arrive at the better choice only by considering carefully every factor. The elements of cost and certainty of the whereabouts of the person called are important. The secretary should—

(a) Place a station-to-station call if there is reason to believe the person wanted will be near his telephone, or if the business to be discussed can be talked over with anyone at the telephone station called.

(b) Place a person-to-person call when it is necessary to talk with a particular person and there is doubt whether he is near his telephone.

Class of Service	When to Use	Initial Time Period
Station-to-station Direct connection service to nearby towns	When willing to talk with anyone answering the telephone	3 to 5 minutes if rate is 25 cents or less; 3 minutes if rate is over 25 cents
Person-to-person	When a particular person is wanted and it is not certain that he is near his telephone	3 minutes
Appointment	When a particular person is wanted at a designated time	3 minutes
Messenger	When a person called has no telephone	3 minutes
Conference	When it is desired to talk with two or more persons simultaneously	3 minutes

[1]Reduced rates are in effect to points beyond 40 or 50 miles from 6:00 p.

How to Place	Relationship of Rates[1]
Give long distance operator name of city and telephone number if possible, or name and address of subscriber being called.*	Least expensive class of service
Give name of city and telephone number to local operator. If necessary, get number from local *Information* before placing call.*	See front of local directory for specific rates
Give long distance operator name of city and state, name and address of person being called, and, if possible, telephone number.*	Higher than station-to-station rates
Give long distance operator same information as for person-to-person call and the time you want connection.*	Person-to-person rates
Give long distance operator name of city, telephone number or name of nearest subscriber, if possible, and name of person wanted.*	Person-to-person rates plus actual charge of messenger service
Arrange through long distance operator and conference operator.* *The operator will also need to know the telephone number of the person placing the call or the number to which the call is to be charged. In some cases the operator will also ask for the name of the person making the call.	Rates based on the person-to-person rate between the two points in the conference that are farthest apart, plus an increment for each additional telephone in the conference

to 4:30 a.m. each night and all day Sunday.

If you were asked to reach a salesman at his home office, it would not be good judgment to place a station-to-station call. More likely he would be out in his territory. On the other hand, if you were asked to call the manager of the New York branch office, who is usually at his desk, you might place a station-to-station call.

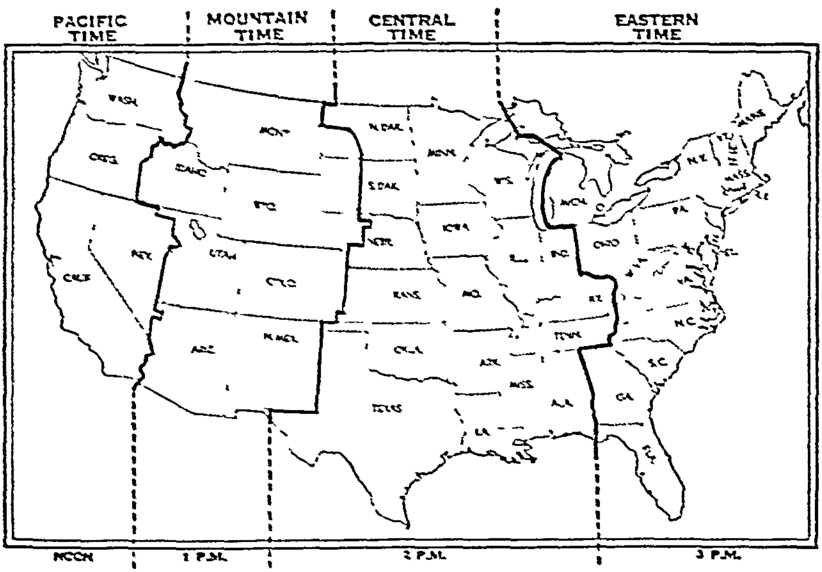
Conference Service. Conference service is used when the calling party wants to talk with two or more telephone stations simultaneously. It can be used to connect the calling telephone with two or more toll points, or with one toll point and one or more local telephones. The latter service might be used by scattered members of a family living in one city when they want to talk with a distant relative. A conference call can be placed station-to-station or person-to-person, the charges being the same in either case. *It is necessary to ask the long distance* operator for the conference operator, as the making of conference connections must be concentrated at a special switchboard section. Such calls in business are usually prearranged for best results. The charge is based on the distance between the two telephones that are farthest apart, and an additional charge is made for each extra telephone in the conversation.

Techniques of Handling Long Distance Calls

PLACING LONG DISTANCE CALLS A long distance call is completed most promptly when the person placing the call gives the long distance operator the name of the city being called first so that she can begin to make the connection immediately, while recording the rest of the information. This saves not only the time of the operator but also that of the person calling. To place a person-to-person call, the secretary should give the long distance operator the name of the city being called, the telephone number or the address, and the name of the person called. Some secretaries also identify the type of call they are placing by saying, "This is a person-to-person call." Finally, the caller should give her own telephone number when the operator asks for it. If the secretary is placing a person-to-person call to Chicago, she should say to the long distance operator, "I want Chicago, Central 7318, Mr. Pearson."

When you have an unusual problem, explain it to the long distance operator, and she will try to help you. One secretary had to call an official in Washington, D. C., at two o'clock for her employer who expected to be in the local courthouse near another telephone at that time. She explained the situation to the operator, who placed the call at two o'clock and made the connection to the courthouse telephone, but charged the call to the employer's own office telephone. Another secretary was told to get in touch with Mr. A. J. Dearing who was at some Pittsburgh hotel. She called the long distance operator and told her that was all the information she could give except that she believed he would be staying at one of the better hotels. The operator then began a check of the hotels until she located Mr. Dearing. These are not unusual experiences, and the secretary should not hesitate to ask for this kind of service.

TIME ZONES The United States is divided into four standard time zones: Eastern, Central, Mountain, and Pacific. When it is 3:00 p. m. Eastern standard



TIME-ZONE MAP

The map shows the boundaries of each time zone and the time in each zone when it is high noon Pacific time.

operator immediately after completion of the calls, telephone companies generally dispense with this service except when it is specifically requested by the customer.

COST RECORDS OF TOLL CALLS Although long distance telephone service is the quickest means of direct communication, its cost may be higher than either telegraph or mail. Most companies charge such costs in their accounting records to a specific department, client, or job. Perhaps one call should be charged to sales expense and another to collection expense. From memorandum records showing the date, point called, and calling party or extension, the correct distribution can be determined without difficulty. As a means of distributing the cost to the proper departments or jobs, the P.B.X. attendant or the secretary should keep an accurate memorandum record of all long distance calls made by her company or department and of the collect calls accepted. When the monthly toll statement is received, the charges are transferred from it to the individual memorandum records. The memorandums may be kept on a daily calendar if it is the permanent type or on individual slips for each call.

TOLL CREDIT CARDS Your employer may carry a Bell System toll credit card, which entitles him to charge his long distance calls to his home or business number while traveling. It shows his code number, name, business affiliation, and the telephone to be charged with his calls. In usage, the employer tells the long distance operator that the call is a credit card call and gives her both his code number and the chargeable telephone number and then proceeds to make the call as usual.

RECEIVING LONG DISTANCE CALLS Occasionally when your employer is absent, you will have to take long distance calls. If so, listen carefully and repeat your understanding of the message. Type a full report of the call immediately, so that there will be a correct and complete record for the employer when he returns.

If your employer is not available to answer a person-to-person call, give the long distance operator full information as

MOBILE SERVICE This service was inaugurated in 1946. It requires the installation of mobile radiotelephone equipment on the mobile unit, such as an automobile, bus, truck, switch engine, or ship. By early 1949 service was being given by Bell companies in more than 130 areas to more than 6,400 mobile telephones. This service is also given in some areas by independent companies. To place a call to a mobile telephone, reach Long Distance and then ask for the mobile service operator.

LOUD-SPEAKER SERVICE There are occasions when an employer may want to telephone a message to a group of listeners at one or several locations. Special arrangements for this loud-speaker service are made with the telephone company, which connects loud-speakers to the receiving telephones. An Eastern university professor uses this service in his weekly lecture by having an eminent political figure telephone a message direct to his class where it is amplified for all of the students to hear.

A loud-speaker message can also be handled as a conference call and sent out to several receiving telephones at the same time. If the president of an automobile manufacturing company wanted to talk to all of his dealers at one time, he would ask them to gather at centrally located spots where the calls would be received.

Utilizing loud-speaker service is, in reality, conducting a meeting by telephone. It requires planning and advance notification the same as any other meeting.

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DISCUSSION QUESTIONS

1. In handling incoming local calls, exactly what would you say if your employer is —

(a) On a sales trip in another state and will not be back for several days?

(b) At a local print shop to check on a catalog being printed for your company?

(c) At the bank to get some papers from his safe-deposit box?

(d) At the state capitol checking on a bill that the legislature is considering?

(e) In conference with the president of the firm?

2. Criticize or comment upon the secretarial procedure in each of the following situations:

(a) When the telephone rings, the secretary picks up the receiver and says, "Mr. Yoder's office, Miss Darnell speaking." After a moment she says, "Please hold the line while I get a pencil and a pad of paper."

(b) An employer asks his secretary to call the telephone company and report that his telephone has not been working satisfactorily. She returns to her desk and dials 411, which is the number for Information.

(c) The secretary is asked to call the employer's home. She locates the number in the alphabetic telephone directory and makes the call.

(d) When the employer returns after an hour's absence from the office, his secretary gives him a detailed oral report on five incoming telephone calls.

3. If your employer has given you a short message to be delivered to an executive whose office is adjacent to that of your employer, would it be better to telephone the message, to deliver it personally, or to write an interoffice memorandum?

4. When a call between two executives is being connected by their secretaries, the question may come up as to which executive should be placed on the line first to await the answer of the other executive. What is your opinion?

5. Your employer left the office at noon to play golf with instructions that he is not to be disturbed unless necessary. During the afternoon a call is received from a Mr. Apgar, whom you do not recognize. Mr. Apgar will not state his business but insists that it is important that he talk with your employer before closing time. How would you handle the situation?

6. Your personal telephone list of frequently used numbers must be continually revised because of changes in numbers, addi-

tions, and deletions. What system for keeping your list can you suggest which will facilitate these changes?

7. Under what circumstances do you think that a letter of confirmation needs to be sent following a long distance call?

PROBLEMS

1. Locate in the alphabetic section of your local telephone directory the numbers for the following. Type in tabular form a report showing for each item the organization or department wanted, the name under which the telephone is listed, and the telephone number.

(a) City Hall
(b) Western Union
(c) Fire Department
(d) Park or Recreation Department
(e) Police Department
(f) Post Office
(g) Public Library
(h) The nearest hospital
(i) Your college or university
(j) The local office of the state employment service

2. The purpose of this problem is to help you to become familiar with the organization of your classified telephone directory. If the directory for your community does not have a classified section, you should, if possible, use the directory of some nearby city.

Type a report showing for each of the following types of subscribers the identifying letter and the heading in the classified telephone directory under which you would find the names of subscribers of the type indicated.

(a) Attorneys
(b) Dealers in advertising stickers
(c) Agents for calculating machines
(d) Interior decorators
(e) Certified public accountants
(f) Dealers in traveling bags
(g) Income tax specialists
(h) Ministers
(i) Dealers in window screens
(j) Dealers in window shades

3. What information would you give to the long distance operator in each of the following situations?

(a) Your employer, Mr. Arnold, is attending a Kiwanis luncheon meeting at the Bismarck Hotel and expects to be back at his desk at 1:30 p.m. At 12:15 a long distance call comes in from his superior, who is in Boston.

(b) At closing time the long distance operator has not reached a person with whom your employer must talk before the next morning. Your employer is going out for dinner to his brother's home, but he will be at his own home until 7:00 p.m.

(c) Your employer is playing golf. The long distance operator informs you that she has a call from his New York broker, who wants to talk with him as soon as possible.

(d) Your employer is writing copy for an advertising circular and has told you that he does not wish to be disturbed under any circumstances before four o'clock. A call comes in from his assistant, who is in Baltimore attending a sales conference. The assistant will be leaving Baltimore on a three o'clock train.

4. Telephone manners require that one use courtesy and tact in phrasing. The following is a list of poor expressions used in telephone conversations. Submit rephrased courteous statements in typewritten form.

(a) I'll put Mr. Jones on the wire.
(b) Who's this?
(c) Hold the 'phone.
(d) Who do you want to talk to?
(e) What do you want to talk to Mr. Jones about?
(f) I can't hear you!
(g) OK, I'll see that it is taken care of.
(h) Mr. Jones left word that he is not to be disturbed; I'll take the message.
(i) I want you to have him call Mr. Jones before two o'clock.

PROJECTS

A. Reporting Incoming Telephone Calls. The following incoming telephone calls were received while your employer, Mr. Simpson, was out of the office. Fill out a brief memorandum for Mr. Simpson on each call.

(1) Mr. Riley called at 3:25 and left a message that he would pick up your employer at 5:10 at the front entrance to the building.

(2) Mr. Seeley, of the District Sales Corporation, called at 3:30; he stated he would call back at 4:30.

(3) Mr. Filer, of the Acme Corporation, called at 4:00 about their order for equipment and wants you to call him back. His number is MU 2-1148.

(4) Mr. Mize, of the Cleveland office, called long distance at 4:10 to tell you that the Fuller Implement Company order is to be canceled. A letter of explanation will be put in the mail tonight.

B. Making Long Distance Calls. Assume that your employer, Robert L. Simpson, wishes to make the following out-of-town calls from the office telephone, Main 1392, on the current date. Exactly what would you say in placing each call?

(1) A person-to-person call to Dr. E. B. Snyder, of Fort Worth, Texas, relative to a personal matter. You do not know his number or address, but he is a noted eye specialist.

(2) A call to H. N. Hayes, of the Rand Construction Company, on Walnut Street, in Baltimore, Maryland, regarding a back order for parts. Mr. Simpson wants a report on the charges.

(3) A station-to-station personal call to Mr. Simpson's mother, who lives in Grand Rapids, Michigan. Her number is 4185-J.

(4) A call to Andrew Currey, of the Diamond Supply Company. in Los Angeles, about the cancellation of our order. The number is Belmont 7-6123. The charges are to be reversed.

(5) A call to the Gem Products Company, on Twelfth Avenue, in Springdale. The call is to check the references of L. C. Swenson, an applicant. You do not know the telephone number.

(6) A call to Mr. Simpson's wife, who is visiting in Nashville, Tennessee. Her number is Dixie 7316-J. It need not be a person-to-person call. He wants the call charged to his home number, Colonial 5160.

C. Recording Toll Calls. In order that the monthly toll statement received from the telephone company may be audited (checked for correctness) and the charges allocated to the proper offices or persons, the secretary keeps a record of each toll call when it is made. Prepare four copies of a form that might be used for this purpose. The form should show the date; the person, the firm, and the city called; the one who ordered the call placed; the amount; and the person or department to whom the call is to be charged. Record on the forms prepared the first four toll calls made in Project B. All calls other than personal ones are charged to General Administrative Expense (GAE). The P.B.X. attendant reported the following total charges (toll plus Federal tax) on the calls:

Fort Worth	$1.95	Grand Rapids	$1.25
Baltimore	2.87	Springdale	.82

CHAPTER 12

POSTAL AND SHIPPING FACILITIES

HANDLING outgoing letters and packages in an efficient and practical manner requires a thorough knowledge of postal and shipping services. The secretary in a small office is usually responsible for each step involved. The secretary in a large organization that has mail and shipping clerks must know in each instance which class of service to specify, its particular limitations, its speed of delivery, and perhaps its cost and the responsibility of the Post Office or carrier in making prompt delivery of the item in good condition.

Domestic Postal Services

The *United States Official Postal Guide*, published biennially by the Post Office Department of the Federal Government, is the authoritative source of reference on postal services. A firm that sends out quantities of mail generally purchases a current copy of the Guide for the use of its mailing department, but a smaller firm may rely upon its employees' knowledge of the various classes of postal services and rates.

Up-to-date literature about postal services can be obtained from the local post office or from the Post Office Department, Third Assistant Postmaster General, Washington, D.C. In common with practically all business activities, postal rates and services change. The secretary who is on her toes will see to it that her reference notebook contains current information.

It is not expected that the secretary remember, or try to remember, all of the postal facts in this chapter; but she should know the services available and have the facts in her desk for reference or be able to find them when postal or shipping problems arise.

CLASSES OF SERVICE Domestic mail matter includes mail for delivery locally, or within the United States, or to or from or between the possessions of the United

The rate to an individual who mails an unsealed newspaper or magazine is 1 cent for each 2 ounces or fraction thereof; when the weight is over 8 ounces, the fourth-class rate is charged if that computed cost is lower than at second-class rates.

Third-Class Mail. This service is used for matter not in first or second class and which does not exceed 8 ounces in weight. It includes specified types of mailable matter at different rates.

RATES FOR THIRD-CLASS MAIL

KINDS OF THIRD-CLASS MATTER	RATES
Merchandise, circulars and other printed material, corrected proof sheets with or without accompanying manuscript, drawings, photographs, photostats, and hotel and steamship room keys.	2¢ for first 2 ounces; 1¢ for each additional ounce
Printed books and catalogs of 24 pages or more; seeds, cuttings, bulbs, roots, scions, and plants.	1½¢ for each 2 ounces or fraction thereof
Twenty or more unsealed envelopes containing identical reproductions of handwritten or typewritten matter. (These must be taken to post office window to get this rate.)	1½¢ for each 2 ounces of total weight

Special regulations and rates for bulk mailings can be obtained from the local post office.

Fourth-Class Mail. The more common term for this class is *parcel post.* It includes all mailable matter not in first or second class that weighs over 8 ounces. Parcels cannot exceed 70 pounds in weight or 100 inches in length and girth combined. In the determination of the size, length is the greatest distance in a straight line between the ends; girth is the distance around the parcel. For example, a parcel 40 inches long, 15 inches wide, and 10 inches high measures 90 inches in length and girth combined — length 40 inches, girth, 15 inches plus 10 inches plus 15 inches plus 10 inches.

The Post Office recommends that the address be put on only one side of the package because, if the postal dispatching clerk sees an address without postage stamps, he has to take the time to see if stamps have been affixed on some other side.

A parcel-post package may be sealed provided a printed label shows the nature of the contents, together with the words, "Postmaster: This parcel may be opened for postal inspection if necessary." The name and the address of the sender, which must appear on the label, should preferably be printed although writing or stamping is acceptable.

Parcel-post rates are scaled according to the weight of the package and the distance the package is being transmitted. Every local post office charts the country into zones. The distances of these zones and the rates for packages up to 10 pounds are shown in the table. Rates for each pound exceeding 10 can be found in the latest copy of the Postal Guide or in a circular from the local post office, or they can be obtained by calling the local postmaster.

PARCEL-POST ZONES AND RATES FOR THE FIRST 10 POUNDS

ZONE	DISTANCE	RATE FOR 1ST POUND	RATE FOR EACH POUND, 2ND THROUGH 10TH
Local	Local Limits	10¢	1.0¢
1	Up to 50 miles	12¢	2.1¢
2	50 to 150 miles	12¢	2.1¢
3	150 to 300 miles	13¢	3.0¢
4	300 to 600 miles	14¢	4.5¢
5	600 to 1,000 miles	15¢	6.0¢
6	1,000 to 1,400 miles	16¢	7.5¢
7	1,400 to 1,800 miles	17¢	9.5¢
8	Over 1,800 miles	18¢	11.5¢

A fraction of a pound is computed as a full pound, and a fraction of a cent in the total is considered as a full cent. A 7½ pound parcel being mailed to the second zone would cost 27¢ (first pound, 12¢; next 6½ pounds at 2.1¢ each, 7 times 2.1¢, or 14.7¢).

Book Rate. A special rate applies to bound books of 24 printed pages or more consisting wholly of reading matter; it does not apply to those books containing advertisements, other than incidental announcements of books. The rate for one

pound is 8 cents; the rate for each additional pound, 4 cents. The rates are the same for all zones. The limit is 70 pounds.

Libraries and nonprofit organizations can obtain an even lower rate for books upon application to the Postmaster General.

Catalog Rates. There are zone catalog rates for individually addressed catalogs and similar printed advertising matter in bound form, consisting of 24 or more pages and weighing more than 8 ounces but not exceeding 10 pounds. Matter mailed at catalog rates may include the common types of incidental loose enclosures, such as reply envelopes, purchase order forms, and circulars. In order to distinguish matter that is mailed in this classification, each piece should be clearly endorsed "Sec. 34.77, P. L. & R." in the upper right corner above the stamp or permit indicia.

CATALOG RATES

ZONE	LOCAL	1	2	3	4	5	6	7	8
First pound	7½¢	8¢	8¢	9¢	10¢	12¢	13¢	14¢	15¢
Each additional pound	1¢	1½¢	1½¢	2¢	2½¢	3¢	4¢	5¢	6¢

Note that these rates are less expensive than parcel-post rates.

Air Mail. This type of service is usually faster in speed of transmission than is regular mail. Standard rates apply to cards, letters, and packages under 8 ounces; and zone rates apply to air parcel post, that is, air mail weighing over 8 ounces. All air-mail matter can be sealed. Anything can be sent by air mail except that which might freeze at high altitudes. The rates given in the table on air-mail services cover mail transmitted as follows:

1. Between points in the United States
2. To Canada and Mexico
3. To any person having an address containing an Army Post Office number or a Fleet Post Office designation
4. To, from, within, or between points in the United States, Alaska, Hawaii, Puerto Rico, Canal Zone, Guam, Virgin Islands of the United States, and Canton Island

KINDS OF AIR-MAIL SERVICE AND THE RATES APPLICABLE TO EACH

TYPES OF MATTER	RATES	REMARKS
Post and postal cards	4¢ each	Use the distinctive air-mail cards, or have VIA AIR MAIL conspicuously above the address.
Business reply cards	5¢ each	
Letters	6¢ an ounce or fraction thereof	Use lightweight stationery. Envelopes should be bordered in red, white, and blue; or they should have AIR MAIL above the address.
Business reply envelopes	7¢ each	Use the distinctive air-mail envelopes, or have VIA AIR MAIL conspicuously above the address.
Parcels up to 8 ounces	6¢ an ounce or fraction thereof	Put VIA AIR MAIL on *each* side of the parcel.
Air parcel post — packages over 8 ounces but not more than 70 pounds or exceeding 100 inches in length and girth.	Rates are scaled according to weight and zone.	Parcels receive special handling without extra charge. Put VIA AIR MAIL on each side of the package. Parcels can be sent registered, insured, or C.O.D. Return postage must be paid by the sender.

To use air-mail service advantageously, obtain from the local post office a schedule showing the times the mail leaves the post office for the airport. Mail must be in the post office thirty minutes prior to the times such mail is scheduled to leave. Even though air-mail service is indicated on the envelope or package, the post office will send the letter by train if that is a faster means of delivery.

The secretary will discover that, because of the peculiarities of each business, much of the daily mail is sent to the same cities, and it is simply a case of setting up a few dispatch schedules showing the times of day by which air mail must be

posted to certain destinations in order to get the speediest service. If you request the Postmaster or Superintendent of Mails of your local post office to put your name and firm address on his mailing list, you will receive current and revised copies of both domestic and foreign air-mail dispatch schedules.

Free Matter. Material that may be mailed without postage is strictly limited by postal regulations. Matter for copyright addressed to the Register of Copyrights, Washington, D. C., will be accepted for mailing free of postage if the envelope is taken to the post office. When requested, a receipt for such a parcel will be given if the sender furnishes the form for it. Such matter, however, may not be sent by registered mail unless the registry fee is paid.

Members of Congress frank their mail, that is, send it under their official signatures free of charge. Governmental agencies send their mail in penalty envelopes without affixing stamps, but such mail must relate to official business.

SPECIAL SERVICES

Certificates of Mailing. A receipt or certificate of mailing for mail of any class may be obtained from the post office upon payment of one cent for each receipt or certificate. A one-cent uncanceled postage stamp to cover the charge is attached to the certificate and canceled by the postmark of the mailing office to show the date of mailing. Such a certificate furnishes a legal record that a piece of mail has been dispatched.

Special Delivery and Special Handling. *Special delivery* service may be used for all classes of mail. It includes prompt handling plus immediate delivery. Parcel-post packages only may be sent *special handling.* Such packages are given the most expeditious handling and transportation practicable but not special delivery at point of destination. Air parcel post receives special handling without extra charge. Special handling is recommended for fragile or perishable articles. The rates for these services are shown in the table on the next page. These rates are in addition to regular postage charges.

Registered and Insured Mail. Mail may be insured against loss, rifling, or damage by paying an additional fee. Air-mail,

SPECIAL HANDLING AND SPECIAL DELIVERY RATES

Weight	Special Handling Rates Parcel Post Only	Special Delivery Rates	
		1st Class	2nd, 3rd, or 4th Class
Up to 2 pounds	15¢	15¢	25¢
Over 2 pounds and not more than 10 pounds	20¢	25¢	35¢
Over 10 pounds	25¢	35¢	45¢

first-, second-, and third- class matter may be *registered* in order to safeguard its transmission. If registered matter is lost, stolen, or damaged, the Post Office Department will indemnify the sender according to the registry terms. Valuable papers, such as deeds, and articles, such as jewelry, should be registered.

Matter is registered by taking it to the registry window at the post office and paying, in addition to the regular postage, a registry fee. The envelope or the parcel is stamped with the proper postage and its registry number, in addition to any other required endorsements. First-class mail and air mail are stamped at several places along the sealed lines.

The amount of the registry fee depends upon the value for which the sender desires to claim indemnity in case of loss, rifling, or damage. It is not necessary to register an article for its full value; but a surcharge fee, in addition to the registry fee, is collected where the declared value of the contents is in excess of the indemnity covered by the regular fee paid. For instance, a package containing a wrist watch with a declared value of $75 may be registered for a fee of 40 cents, which carries indemnity not exceeding $50. The additional charge for the unindemnified $25 would be 2 cents. If the package were registered for the full $75 indemnity, the registry fee would be 45 cents—only 3 cents more. The purpose of the registry surcharge is to partially meet the additional expense of providing special protection to valuable mail while it is being delivered by the Post Office Department.

Third- and fourth-class matter may be *insured* against loss, rifling, or damage at rates scaled according to the value of the

FEES FOR REGISTERING AIR MAIL AND FIRST-, SECOND-, AND THIRD-CLASS MATTER

Indemnity Limits and Registration Fees		Indemnity Limits and Registration Fees	
$0.01 to $5	$0.25	$300.01 to $400	$0.85
$5.01 to $25	.35	$400.01 to $500	1.00
$25.01 to $50	.40	$500.01 to $600	1.10
$50.01 to $75	.45	$600.01 to $700	1.20
$75.01 to $100	.50	$700.01 to $800	1.30
$100.01 to $200	.60	$800.01 to $900	1.40
$200.01 to $300	.70	$900.01 to $1,000	1.50

parcel. The clerk accepting an insured parcel at the post office window is required to ask the sender to describe the contents in order that he may endorse the package *Fragile, Perishable, Butter*, or some other appropriate indication of the nature of the contents. The complete name and address of the sender must appear on an insured package, even if the sender is a widely known business concern.

FEES FOR INSURING THIRD- AND FOURTH-CLASS MAIL

Amount of Insurance and Fee		Amount of Insurance and Fee	
$0.01 to $5	5¢	$25.01 to $50	20¢
$5.01 to $10	10¢	$50.01 to $100	25¢
$10.01 to $25	15¢	$100.01 to $200 (max.)	30¢

On registering or insuring mail, the sender is given a numbered receipt by the postal clerk. This receipt should be completed by the secretary and attached to the proper correspondence. This receipt is needed when a claim for indemnity or insurance is placed with the post office.

Return Receipts. A receipt, showing when and to whom a piece of registered or insured mail was delivered, will be returned to the sender who pays an additional fee of 5 cents for this service. The request must be made at the time of mailing. If the receipt is requested later, the fee is 10 cents. A charge of 31 cents is made for a return receipt requested at the time of mailing to show when, to whom, and where the registered or insured

Money Orders and Postal Notes. A remittance may be sent through the mail by a money order or a postal note. For the purchase of the first kind, the remitter fills in an application form, providing his own name and address, the name and the address of the payee, and the amount of the remittance. From this information the post office clerk makes out the postal money order. The maximum amount for a single money order of this type is $100, but there is no restriction on the number of money orders that may be issued to the same remitter to be sent to the same payee. A lost money order may be duplicated from the record at the post office where it was issued.

FEES FOR MONEY ORDERS UP TO THE MAXIMUM OF $100

From $ .01 to $ 5.00	$0.10
From $ 5.01 to $ 10.00	.15
From $10.01 to $ 50.00	.25
From $50.01 to $100.00	.35

A postal note may be purchased at a cost of 8 cents for any amount up to $10. This is an over-the-counter transaction, the buyer merely asking the postal clerk for a postal note in the amount desired. It is a prenumbered, key-punched card in individual dollar denominations. Amounts in cents are shown by affixing stamps of the appropriate denominations to the postal note. Lines are provided for the buyer to fill in the name and address of the recipient. A postal note is valid for two calendar months after the date of issue.

FREE POSTAL SERVICES

General Delivery. Mail may be addressed to the General Delivery window of a post office. This service is convenient for transients and individuals who have no definite address in a city to furnish to correspondents. Such mail is held at the window for a specified number of days and, if uncalled for, is then returned to the sender.

A sales representative who is driving for several days and does not have hotel addresses, frequently asks his home office to address his mail in care of General Delivery to a city en route.

Forwarding. No additional postage is necessary to forward post cards, postal cards, or letters that have been prepaid at

The procedure entails filing a written application together with a duplicate of the addressed envelope or wrapper for identification. If the mail matter is en route to the city of destination, the postmaster will telegraph a request for its return if the sender will pay for the cost of the message.

Official Information. Whenever you are confronted with an unusual problem involving postal services or costs, call the Postmaster or the Superintendent of Mails in the local post office. He or one of his assistants will give you the latest official information.

POSTAGE

Stamps. Postage stamps are available in many denominations. They are also available in different forms; namely, sheet, coil, and booklet. Everyone is familiar with the 100-stamp sheet from which the postal clerk sells stamps to the buyer at his window and the little booklets of bound stamps for home use. Coil stamps are often used in business because they can be quickly affixed to envelopes and because they are less likely to be lost or mutilated than are individual stamps. They are coiled either sidewise or endwise.

Precanceled stamps may be used only by those persons or firms who have been given a permit to use them and only on matter presented at the office where the precanceled stamps were issued. Their advantage is the saving of canceling time at the post office when the mail is received there for dispatching.

Stamped Envelopes and Cards. Stamped envelopes in various sizes and denominations may be purchased at the post office. They are adaptable for first-class, third-class, and air-mail matter and are available with or without return addresses imprinted on them. Government postal cards are available in first-class or air-mail styles. They also come in single or double form, the latter being used when a reply is desired on the attached card.

Postage Meter Machines. One of the newer ways of affixing postage to mail is by using a postage meter machine. It stamps on each piece of mail the postmark and the proper amount of

Such a machine also eliminates the loss of paper stamps from mutilation and makes it obvious when employees use company postage for personal mail. The large meter machine is usually operated by the mail clerk, but a desk model is now made for the secretary's use.

Postage Due. When a piece of mail does not have sufficient postage on it, the postman will collect in cash from the addressee the amount of postage due plus a penalty for each ounce over the first two. It is a breach of business etiquette to send mail without sufficient postage and thus to make the recipient pay not only the postage due but perhaps a penalty besides. Be careful not to let this happen. The unfortunate part of it is that the recipient pays the amount and is annoyed; but because the amount involved is so small, he does not mention the occurrence. Repeated requests for postage due may destroy a lot of goodwill.

Redeeming Stamped Supplies. Unserviceable and spoiled prestamped postal supplies can be redeemed. Prestamped envelopes ruined in the process of addressing are redeemable at postage value; postal cards are redeemable at 75 per cent of their value. Such redemptions are made in postage stamps, stamped envelopes, or postal cards, but not in cash. Adhesive postage stamps are not redeemed or exchanged unless stamps of the wrong denomination were purchased or damaged stamps were sold.

International Postal Service

MAIL TO FOREIGN COUNTRIES Information about service and rates to foreign countries is contained in a separate volume of the Postal Guide (*United States Official Postal Guide, Part II, International Postal Service*). If you work in an exporting or importing business, it will be well for you to study the rates peculiar to your business, either by inquiring at the local post office or by obtaining a copy of this portion of the Guide from the U. S. Printing Office in Washington. Secretaries in most business offices, however, use foreign mail only occasionally. If this is the case, it is better to telephone for the rate or to have the mail taken to the post office where the postal clerk will compute the mailing cost.

The first-class rate to the following countries is 3 cents an ounce:

Argentina	Mexico
Bolivia	Morocco (Spanish)
Brazil	Newfoundland
Canada	Nicaragua
Chile	Panama
Columbia	Paraguay
Costa Rica	Peru
Cuba	Philippines
Dominican Republic	Rio de Oro
Ecuador	El Salvador
Guatemala	Spain and possessions
Haiti	Spanish Guinea
Honduras (Republic of)	Uruguay
Labrador	Venezuela

The first-class rate to countries other than those listed above is 5 cents for the first ounce and 3 cents for each additional ounce.

To enclose reply postage with correspondence going out of the country, use *international reply coupons*. These may be purchased at the post office and may be exchanged for stamps by the addressee in the country where they are received. The coupons are in 11-cent denominations.

Money can be sent to a foreign country by means of an *international money order* procurable at your local post office.

Air-mail rates vary according to the country of destination. However, the post office sells for 10 cents a prestamped, foreign air-mail, lightweight, combination letter-envelope. It can be mailed to any country with which we maintain air-mail service. It is an envelope that may be opened out flat. The message is written on the inside and then the sheet is folded according to printed instructions on it. The address is written on the outside in the section which is prestamped. No enclosures are permitted in this type of letter.

Express and Freight Services

Shipments are frequently made by other means than the various postal services—by railway express, railroad freight, steamship, and truck. The secretary usually does not need to

have much detailed information about these shipping services at her finger tips, but she does need to know the kinds of services rendered, the advantages of each, and the sources of additional information when she needs it.

EXPRESS SERVICE Railway express gives speedy, dependable service in the shipment of packages. Anything shippable may be sent by express—cats, dogs, polo ponies, food of all kinds, jewelry, etc. There are no limitations as to size, weight, or kind of matter that may be shipped.

Advantages of Shipping by Express. The advantages of shipping by express are:

(*a*) *Pickup and Delivery Service.* In most cities an expressman will call at your office or home for the package, give you a receipt, and send the package on its way. It will be delivered promptly to the addressee and a receipt for its delivery obtained. You may telephone the express agency to pick up your package. There is no charge for this pickup service.

(*b*) *Automatic Insurance.* Express charges include free insurance on shipments valued up to $50 and weighing 100 pounds or less.

Packages weighing over 100 pounds are insured automatically for their value up to 50 cents a pound. A small additional charge is made on shipments valued over $50.

(*c*) *Special Protection.* Express shipments travel in express cars or passenger trains with suitable protection. "Value" shipments, such as money or gems, are forwarded under hand-to-hand signature. Small packages usually travel in trunks. Animals are fed and cared for en route. Food perishables are kept under refrigeration. The necessary personal attention is given to every shipment.

(*d*) *Speed.* Express is faster than freight. Its cars travel in passenger and special express trains.

Express Charges. Express charges are based on the weight of the shipment, the distance it has to travel to reach its destination, and the nature of the commodity being shipped. Charges

on shipments of certain weights to certain zones are less expensive than parcel post, but in other instances they may be higher. The express agency will give you an estimate of shipping cost over the telephone if you wish to compare costs before deciding which service to use. Express charges on a shipment can be prepaid or collected from the addressee on delivery.

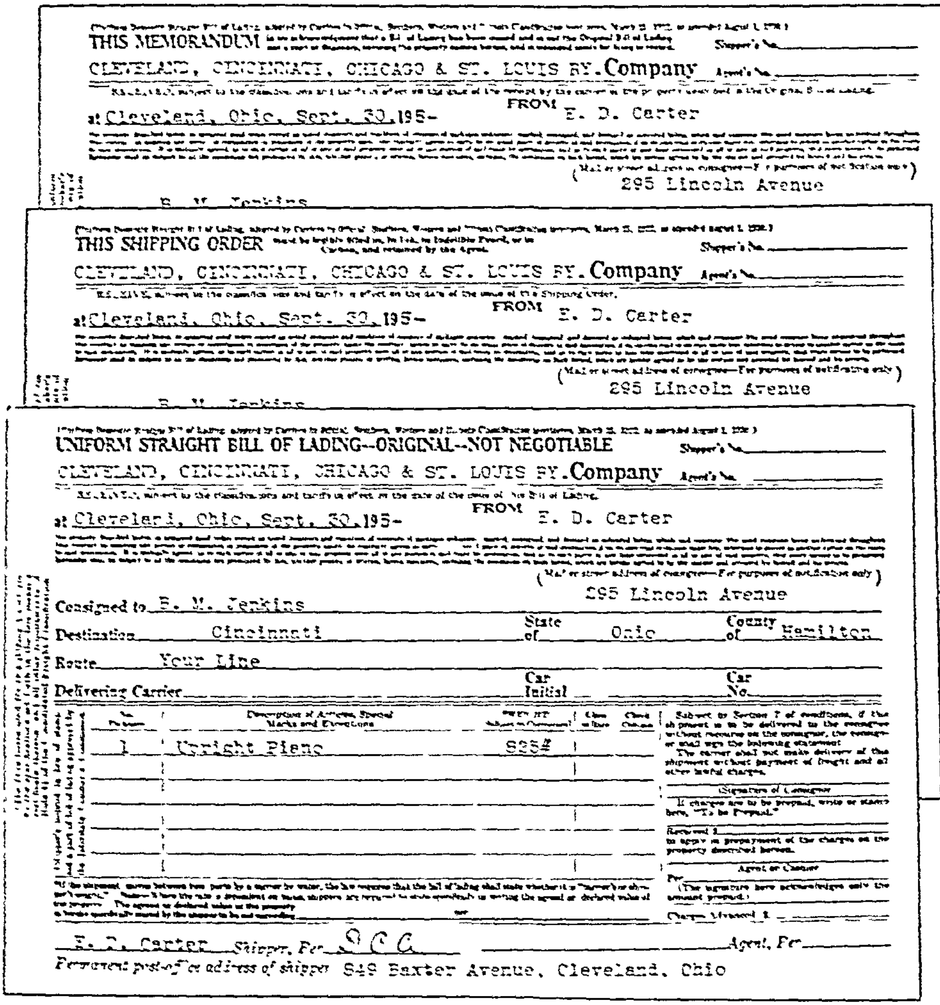
Express shipments may be sent C.O.D. for a nominal charge. The consignee pays all or part of the collect-on-delivery charges according to the instructions given by the shipper. An express money order for the amount due the shipper is then promptly forwarded to him.

Air Express. Air express is the fastest express transportation possible. Shipments are picked up and given special delivery on arrival without extra charge. Rates are based on weight and air miles traveled.

FREIGHT SERVICES When shipments are large and bulky and speed of delivery is not of the first importance, freight is used. Because shipping by freight is the most complex of all transportation methods, the secretary will probably not be required to select the carrier and route the shipments. She should, however, know the following facts about freight shipping.

A *bill of lading* is made out in triplicate for every freight shipment. It is a receipt for the goods to be shipped and a contract to deliver them. Bills of lading are often prepared in the shipper's office on forms furnished by the carrier, so that it is only necessary for the carrier representative to sign the copies. The signed original copy is mailed to the consignee; the second copy, the shipping order, is retained by the carrier; the third copy, the memorandum, is kept by the shipper for his record.

There are three kinds of freight carriers—railroad, steamship, and truck. To ship by rail is more expensive than to ship by water, but the latter is much slower. Truck carriers are usually selected when the distances are comparatively short. Ordinarily the shipper who uses railroad freight service must get the shipment to the freight office, and the consignee must arrange for its delivery when it arrives. But in order to meet



THIS MEMORANDUM

CLEVELAND, CINCINNATI, CHICAGO & ST. LOUIS RY. Company

at Cleveland, Ohio, Sept. 30, 195- FROM E. D. Carter

295 Lincoln Avenue

E. M. Jenkins

THIS SHIPPING ORDER

CLEVELAND, CINCINNATI, CHICAGO & ST. LOUIS RY. Company

at Cleveland, Ohio, Sept. 30, 195- FROM E. D. Carter

295 Lincoln Avenue

E. M. Jenkins

UNIFORM STRAIGHT BILL OF LADING--ORIGINAL--NOT NEGOTIABLE

Shipper's No.

CLEVELAND, CINCINNATI, CHICAGO & ST. LOUIS RY. Company Agent's No.

at Cleveland, Ohio, Sept. 30, 195- FROM E. D. Carter

(Mail or street address of consignee—For purposes of notification only)

295 Lincoln Avenue

Consigned to E. M. Jenkins

Destination Cincinnati State of Ohio County of Hamilton

Route Your Line

Delivering Carrier Car Initial Car No.

No. Packages	Description of Articles, Special Marks and Exceptions	Weight	Class or Rate	Check Column
1	Upright Piano	825#		

E. D. Carter Shipper, Per S C C Agent, Per

Permanent post-office address of shipper 849 Baxter Avenue, Cleveland, Ohio

BILL OF LADING

The freight bill of lading is made out in triplicate on a standard ruled form. Only the original copy is called a bill of lading. The second copy is called the shipping order and is given to the carrier. The third copy is the memorandum copy for the shipper's files.

the competition of trucking companies, railroads in many cities now offer store-door delivery service. They pick up the shipment and deliver it to the door of the consignee.

The secretary to a traffic manager, whose responsibility it is to supervise the movement of goods, will be vitally interested

in shipping facilities and procedures. Such a job requires the utmost accuracy and thoroughness. Study of a good book on traffic management will be helpful. Secretaries who use freight services only occasionally should telephone a local railroad for rates and instructions.

REFERENCE READINGS

United States Official Postal Guide. Washington, D. C.: Superintendent of Documents. Issued Biennially.

WANOUS, S. J., and ERICKSON, L. W. *The Secretary's Book.* New York: The Ronald Press Company, 1948, pp. 257–277.

QUESTIONS ON READINGS

1. What class of postal service applies to (a) an envelope that contains a receipt and that is unsealed when mailed? (b) several newspaper clippings enclosed in a small envelope?

2. Your employer sends a number of current magazines to his daughter at college after they have been read at home. How may the magazines be sent most economically?

3. The following are the measurements of several packages. What is the combined length and girth of each (in inches)? Which packages are mailable as parcel post?

(a) 15″ x 20″ x 25″
(b) 20″ x 20″ x 20″
(c) 6′ x 2″ x 2″
(d) 2′ x 2′ x 1′6″

4. What is the difference between (a) the third-class book rate and the special book rate? (b) "franked" mail and mail sent in penalty envelopes?

5. Under what circumstances might the secretary be asked to obtain a certificate of mailing?

6. What are the advantages of sending a parcel-post package by special delivery? Would there be any advantage in sending a parcel-post package both special delivery and special handling? Should an air parcel-post package be sent special delivery to get the fastest transmission?

7. In what respects does insured mail differ from registered mail?

8. How can one be sure that delivery has been made on (a) a registered letter? (b) a parcel-post package? (c) a first-class package?

9. If you wish to make a payment of $201 by postal money order, how many applications would you need to fill out?

10. Assume that your employer is out of the city on a business trip. How would you go about forwarding each of the following unopened pieces of mail? State whether additional postage is required.

(a) A personal letter
(b) An air-mail letter, which you wish to forward by air mail
(c) A piece of registered mail requiring a signed return receipt
(d) A letter mailed by someone in your office to your employer but returned because of insufficient postage
(e) A letter mailed by your office to the employer but returned because of an insufficient address
(f) A special-delivery letter you wish to be forwarded by special delivery.

11. How do you go about recalling a piece of mail that has been posted but not yet delivered?

12. Each day many pieces of correspondence go out from the home office of a company to each of its various branches. What would be the most economical way to handle the mail to each branch?

13. What is the difference between insurance on a parcel-post package and on an express package?

DISCUSSION QUESTIONS

1. If you were a secretary in a small office, in what form do you think it would be most convenient to use stamps—sheet, coil, or booklet?

2. What are the advantages and disadvantages of using a postage meter machine?

3. When would you use each of the following shipping services in preference to the others? Be specific, taking into consideration such factors as distance, speed, cost, and dependability.

(a) Air express
(b) Freight
(c) Parcel post
(d) Railway express
(e) Truck
(f) Air parcel post

4. If your employer contemplated sending out a bulk mailing of identical pieces of mail to the several thousand names on your mailing list and he asked you to find out the mailing procedure to follow in such a situation, what would you do?

5. If on March 12 your employer handed you an addressed and sealed envelope for stamping and mailing, and said that it contained his income tax return and check for the current year, how would you go about obtaining for him legal evidence that it was mailed? (The Federal Government prosecutes a taxpayer whose return is not received, even though the taxpayer has in his files a carbon copy of the return and makes a verbal claim that the return was filed by mail.)

6. What would you do if first-class mail from one of your branch offices was frequently received in an unsealed condition?

7. What would you do if you assigned to your assistant the job of enclosing, sealing, weighing, stamping, and posting each day's mail and in the morning you found for the third time in two weeks that she had left the mail lying on her desk, ready for mailing but not posted?

PROBLEM

1. For each of the numbered items listed below, report the following information:

(a) The class of postal service that should be used. If parcel post is chosen, indicate the zone.
(b) The kinds of charges other than ordinary postage.
(c) Special requirements, if any.

For example: For a parcel of costume jewelry, weighing 1½ pounds, that is being sent 325 miles and is insured for $75, your answer would be: (a) Parcel post, fourth zone, (b) Insurance. No information regarding (c) would be necessary.

(1) An unsealed package of candy weighing 7 ounces sent special delivery.
(2) A pen-corrected copy of a one-page printed stock price list addressed to a traveling salesman.
(3) A money order for $20 addressed to a city 20 miles distant.
(4) A sealed parcel containing lingerie weighing 6 ounces, 8″ by 2″ by 4″, addressed to a city 350 miles away.
(5) A textbook of 480 pages weighing 2½ pounds being transmitted 800 miles.
(6) A box 3 feet long, 1½ feet wide, and 1½ feet high, weighing 40 pounds, addressed to a city 400 miles distant.
(7) A sealed parcel weighing 5 ounces sent air mail.
(8) A sealed package weighing 14 ounces containing a printing plate addressed to a city 550 miles distant, with special handling service.

(9) A sealed parcel containing stationery weighing 12 ounces, 6″ by 4″ by 3″, addressed to a city 350 miles away.
(10) A catalog of 18 pages weighing 4 ounces.
(11) A typewritten copy of a thesis weighing 14 ounces addressed to a city 100 miles away.
(12) A box of bulbs weighing ½ pound.
(13) A monthly statement of a department store to a local customer.
(14) An air-mail, special-delivery letter weighing 2 ounces.
(15) A postal card to a city 300 miles distant.
(16) A parcel weighing 1 pound containing yard goods sent to a city 95 miles distant and insured for $10. A return receipt was requested at the time of mailing.
(17) A check for $8.92 to a city 300 miles away.
(18) A carbon copy of a letter addressed to a person in the same city as the writer.
(19) A magazine weighing 7 ounces addressed to a city 30 miles distant and sent by an individual.
(20) A set of blueprints in a mailing tube weighing 7 ounces.
(21) A sealed package weighing 1 pound containing samples of soap sent special delivery to a city 750 miles away.
(22) A magazine weighing 10 ounces addressed to a city 1,500 miles distant and sent by an individual.
(23) Sixty individually addressed unsealed envelopes containing one-page mimeographed price lists.
(24) Copyright matter addressed to Registry of Copyrights in Washington, registered for $5.
(25) A box 2 feet long, 10 inches high, and 14 inches wide, containing automobile parts weighing 40 pounds addressed to a city 250 miles distant.
(26) A letter weighing 3 ounces, addressed to an out-of-town relative, enclosing bonds valued at $700 and registered for full indemnity. Return receipt requested showing address where delivery was made.
(27) A catalog of 480 pages weighing 2½ pounds being transmitted 800 miles.
(28) A parcel weighing 1 pound containing costume jewelry valued at $75 but registered for only $50, being transmitted 2,500 miles.
(29) A sealed parcel weighing 1 pound containing costume jewelry insured for $75 being transmitted 2,500 miles.
(30) A letter containing notice to an heir of an estate registered at minimum indemnity, with return receipt requested showing where envelope was delivered.

CHAPTER 13

BUSINESS USE OF TELEGRAPH SERVICES

TELEGRAPH is the third of the communication services that you will use in your work as a secretary. You will be expected to know how to write and file messages, how to determine the proper class of service to use, how to handle incoming telegrams, and how to use the many services of Western Union to the advantage of your employer.

DOMESTIC TELEGRAPH SERVICES

In most offices your telegraph responsibilities will deal primarily with domestic messages—those that are received from elsewhere in the United States and those that are to be delivered within the United States. It is advisable to secure from the local Western Union office from time to time the latest information about its services, rates, and regulations.

COMPOSING TELEGRAPH MESSAGES In composing a telegraph message, brevity is an important factor because the number of words in the message determines its cost. Clarity should never be sacrificed, however, just to save the expense of an extra word or two. It is best to make a rough draft of the message and then to cut down its length. Nouns and verbs convey precise meanings. Descriptive adjectives and adverbs and the articles can very frequently be omitted.

The following characters on your typewriter can be transmitted in a telegraph message:

(a) All letters of the English alphabet
(b) The Arabic numerals 0 to 9
(c) Punctuation marks: . , : ; - ? ' " " and ( )
(d) Specific characters: $ / & % # '(for feet or minutes) and "(for inches or seconds)

The characters ¢, @, and ° cannot be transmitted and must be written out in words.

COUNTING THE WORDS Since the cost of a domestic telegram is based on the number of words in the message, it is important to know how to count the chargeable words. The following practices are observed:

1. The necessary address and signature are free.

2. Dictionary words in the English, German, French, Italian, Dutch, Portuguese, Spanish, and Latin languages are counted as one word each, regardless of length.

3. A combination of single dictionary words, even without spaces between, is counted according to the number of words in the combination. This applies to trade names also.

FULL-RATE	2 words
POSTOFFICE	2 words
ITIS	2 words
PUREWHITE	2 words

4. Abbreviations are counted at the rate of one word for each five *unspaced* letters. Note that spacing used between units of the abbreviation increases the word count. Periods are considered punctuation and are not counted.

COD	1 word	NY	1 word
C.O.D	1 word	N.Y.	1 word
C. O. D	3 words	N. Y.	2 words

5. Geographic names are counted according to the number of individual words contained in them.

ST. LOUIS	2 words
NEW YORK CITY	3 words
NEW ENGLAND	2 words
RALEIGH, N.C.	2 words
RALEIGH, N. C.	3 words

6. Personal names in messages are counted according to the number of spaced units in the names as they are normally written. Note that using spaces between initials and two-part names increases the word count.

RALPH G. HUDSON	3 words
L. R. WITHAM	3 words
L.R. WITHAM	2 words
MILDRED VAN HORN	3 words
MILDRED VANHORN	2 words
JAMES O'CONNOR	2 words

7. Punctuation marks are neither counted nor charged for. They include:

. (period or decimal point)	( ) (parentheses)
, (comma)	? (question mark)
: (colon)	" " (quotation marks)
; (semicolon)	' (apostrophe)
- (hyphen or dash)	

A message written in paragraphs is transmitted as written at no additional charge.

8. A group of letters not forming a dictionary word in any of the eight languages specified in No. 2 is chargeable at the rate of one word for every five letters or fraction of five letters. Such combinations of letters are usually code words, trade names, or mutilated dictionary words.

AMCOR (code word)..................	1 word
BISQUICK (trade name)..............	2 words
HAVYU (mutilated dictionary words)....	1 word

9. The following signs on your typewriter can be transmitted in messages and are counted as one character in groups of numbers, letters, and signs as covered in No. 10.

$ (*dollar* sign)	# (*number* sign)
% (per cent)	' (feet or minutes)
& (*and* sign)	" (inches or seconds)
/ (fraction bar)	

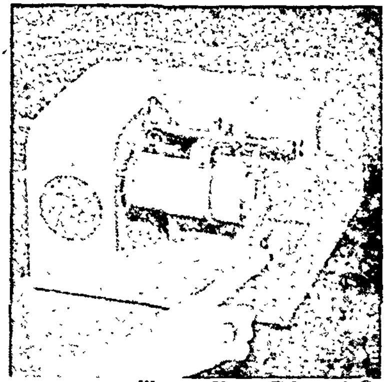
10. Groups of figures, mixed figures and signs, mixed figures and letters, and mixed letters and signs which are separated by spaces are counted as one word for each five characters or fraction of five characters.

13,579 (comma is punctuation)......................	1 word
210,000 (comma is punctuation).....................	2 words
#135B3....................................	2 words
23-½% (hyphen is punctuation)..................	2 words
100 AX-2-½'s (hyphens and apostrophe are punctuation)	3 words
150TH....................................	1 word
(AMG2) (parentheses are punctuation)...............	1 word
AM&STG....................................	2 words
AM & STG....................................	3 words

USING CODE WORDS Business firms selling products or services on a nationwide scale send and receive many telegrams each month. To reduce the number of

(3) The telegram can be filed on a specially installed electrical typewriter called a *teleprinter* and transmitted almost instantaneously to the central telegraph office for sending on its way. A copy of the telegram sent is reproduced on paper tape which the operator pastes on a telegraph blank for record purposes.

(4) By use of *Deskfax,* a small facsimile sending and receiving machine on your desk, a telegram may be sent by merely placing it on the cylinder of the machine and pressing a button. The message, which may be typed or written in longhand, is received in facsimile form on a similar machine at the nearest high-speed telegraph center, which flashes it to its final destination.



Western Union Telegraph Co.

FILING A TELEGRAM BY USE OF THE DESKFAX

(5) A telegram can be filed over the telephone. The following conversation indicates the proper procedure after getting the Western Union operator on the line.

Secretary: I want to send a fast telegram.

(Operator, on answering, is seated at a typewriter ready to take the message on a telegraph blank already inserted in the machine.)

Operator: To whom is the message going?

Secretary: American Society of Planning Officials

Operator: Yes?

Secretary: 805 East 58 Street

Operator: Yes?

Secretary: Chicago, Illinois

Operator: Yes?

Secretary: Please wire final date—

Operator: Yes?

Secretary: —papers may be submitted.

Operator: Yes?

Secretary: Signed L. K. Andrews

Operator: To whom is it to be charged?

Secretary: To Cherry 8793

Operator: Under whose name is that telephone listed?

Secretary: Mr. Andrews

Operator: Who is this talking?

Secretary: This is E.M., operator.

Operator: Shall I read it back?

Secretary: Yes, please.

Operator: Fast telegram to American Society of Planning Officials, 805 East 58 Street, Chicago, Illinois. Please wire final date papers may be submitted. Signed L. K. Andrews, L as in Lincoln, K as in King.

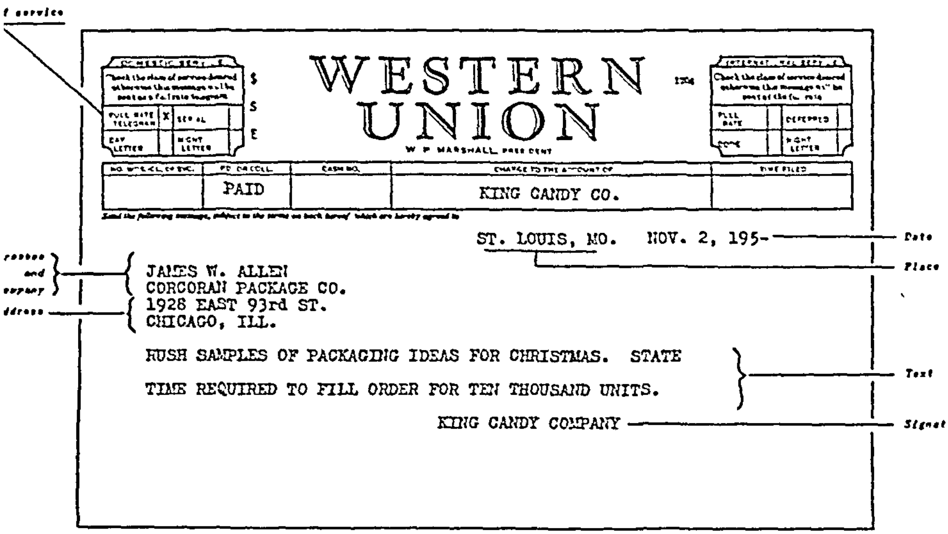
Secretary: That's right. Thank you.

You will notice that the secretary had to give her initials. That is for the telegraph company's record.

TYPING THE TELEGRAM Pads of sending blanks can be obtained free of charge at any Western Union counter. Usually three or more copies of every telegram are typed. The original is given to the messenger. The first carbon or carbons go into the proper correspondence files. The last one is placed in a checking file for use in verifying the monthly telegraph charges. If your employer asks you to keep records of office expenses, you will want to compute the cost of each message from a pamphlet on rates obtained from Western Union and record that cost in pencil on the face of the checking copy.

A sample of a telegram, correctly typed for filing as Western Union would like it done, is shown on the facing page. Note that capitals are used throughout and that the message is double spaced. By studying the model, you will see that the class of service is to be indicated in the upper left-hand corner. If that information is omitted, the message will be sent full rate, which is the fastest and most expensive class of service.

Of the several blocks or boxes just above the message space, Western Union clerks will use the first and third in computing


WESTERN UNION

W. P. MARSHALL, PRESIDENT

PAID

KING CANDY CO.

ST. LOUIS, MO. NOV. 2, 195-

JAMES W. ALLEN
CORCORAN PACKAGE CO.
1926 EAST 93rd ST.
CHICAGO, ILL.

RUSH SAMPLES OF PACKAGING IDEAS FOR CHRISTMAS. STATE
TIME REQUIRED TO FILL ORDER FOR TEN THOUSAND UNITS.

KING CANDY COMPANY

MODEL OF A TELEGRAM PROPERLY TYPED FOR FILING

the cost of the message. The second box may be filled in by the secretary with *Collect* if the message is being sent that way, or with *Paid* if the message is being sent prepaid, that is, paid for in cash at the time of sending, or if it is being charged to the employer's account. When it is to be charged, type the employer's full business name in the box provided. It is advisable to type in the time the message was filed from your office, for that information must be known and recorded if a complaint of delayed delivery is to be made to Western Union or if the recipient claims the message arrived too late for appropriate action. When the telegram is typed, some secretaries remove the original copy from the set and type in the dictator's initials and their own on the carbon copies to complete the record.

In typing the name and address, include all of the information that will help in locating the addressee quickly. A message addressed to John Smith, Empire State Building, New York City, will not be delivered as quickly as one addressed to John Smith, Barton Advertising Associates, Empire State Building, New York City. Similarly, the address 321, 42nd Street may cause delivery attempts on both East and West 42nd Streets. No charge is made for extra words in the name and address lines if they are included to facilitate delivery. However, if the message is addressed to one or the other of two persons,

If it is felt necessary to confirm a message, the better practice is to write a letter, blocking out the telegram as a part of the contents of the letter.

DELIVERY OF TELEGRAMS When a telegram comes to your desk, it requires special and prompt handling, for its very use indicates that it relates to business too important to wait for slower mail delivery. Therefore, attach to it any pertinent information and give it to the employer at once.

A telegram will come to your desk by one of three ways: (1) A Western Union messenger may deliver it in a sealed envelope. (2) The telegram may be telephoned to you from the central telegraph office. The operator will say to you, "I have a telegram for you," and you will then take it down on your note pad, transcribing it on a telegraph blank immediately afterwards. However, it is always wise to ask the operator to have a file copy sent to you by mail for checking, especially if the message contains words or figures that could be distorted over the telephone. (3) The third way involves the use of the *teleprinter* mentioned under "Filing a Telegram," page 255. This machine automatically receives and prints the message on paper tape. The operator pastes the printed tape on a telegraph blank in regular form and sees that it is delivered promptly to the proper person in her organization.

Western Union Telegraph Co.

TELEPRINTER

A telegraph message is coming over the teleprinter on a paper tape and is being pasted on a receiving blank.

a message of twenty-five words. For longer messages a charge is made for each additional five words or less. A night letter is used when next-morning delivery is acceptable.

Repeat-Back and Report-Delivery Services. Two special services can be requested on any of the foregoing types of messages. They are repeat-back and report-delivery services. If *Repeat Back* is typed at the top of the telegraph blank, the destination office of the telegraph company will, for an additional charge, equal to one half the unrepeated message rate, repeat the message back to the sending office to be checked for possible error. If an error is discovered, the corrected message is then sent at no additional charge. The liability of the telegraph company is increased when this service is used. Although this service is not frequently used, it is advantageous when the message contains technical terms, stock numbers, amounts of money, or code words. The words "Repeat Back" are counted as chargeable words when computing the cost of the message.

If the sender wishes the telegraph company to notify him when and to whom delivery of a message is made, *Report Delivery* is written immediately preceding the address as "Arthur W. Brown, Report Delivery, Acme Manufacturing Co. 3495 East . . . ." This instruction counts as two chargeable words. The report stating to whom and when the telegram was delivered is wired back collect from the destination office of the telegraph company to the sender. This service is particularly valuable when you are trying to reach a person who is traveling.

Special Transmission Facilities. If continuous telegraphic connection between two offices is desirable, *private wire service* reserves a circuit for such communications by means of Teleprinters or Morse instruments in the two offices, each of which is used alternately for transmission and reception.

Telemeter service provides direct telegraphic connection between offices that do not use the circuit continuously enough to justify the cost of private wire service. The cost is less because the same circuit is shared by several businesses.

Teletape is a facsimile machine used for interoffice communications. It receives and transmits handwritten messages on a special paper tape.

TOLLS The cost of sending a telegram is called a *toll charge.* It is based on the class of service used, the number of words in the message, and the distance the message is sent.

RELATIONSHIP OF RATES

The Full-Rate Telegram Rate is:		The Night Letter Rate is:					The Day Letter Rate is:		The Serial Rate is:	
For 10 Words or Less	For Each Additional Word	First 25 Words or Less	For Each Additional 5 Words or less				For 50 Words or Less	For Each Additional 10 Words or Less	For 50 Words or Less	For Each Additional 10 Words or Less
			26 to 50 Words	51 to 100 Words	101 to 200 Words	Over 200				
¢	¢	¢	¢	¢	¢	¢	¢	¢	¢	¢
24	1.2	24	0	1.2	1.2	1.2	36	6.0	42	8.4
36	3	28.8	1.2	1.2	1.2	1.2	54	9.6	66	13.2
43.2	3	33.6	1.8	1.2	1.2	1.2	64.8	12.0	78	15.6
50.4	3	36	2.4	1.8	1.2	1.2	75.6	13.2	90	18
57.6	4.2	42	3	2.4	1.8	1.2	86.4	14.4	108	21.6
72	4.2	54	4.2	3.6	3	2.4	108	19.2	132	26.4
86.4	6	66	5.4	4.8	3.6	3	129.6	24.0	156	31.2
108	7.2	78	8.4	6.6	4.8	3.6	162	28.8	198	39.6
144	10.2	90	10.8	9	6	4.2	216	38.4	258	51.6

When you know the full rate between two points, such as 36-3, you can compute the cost of any telegram from the table showing the relationship of rates.

Every Western Union office has printed copies of the rates for messages sent from that city to all other locations in the United States. Only the full rate is listed after each destination. But tolls for other services can be computed from a table called the "Relationship of Rates," as illustrated on this page. You can usually obtain a copy of the rate folder for your locality from your local Western Union office upon request.

In these folders the full rate is usually given in two parts. For example, in the folder for New York City, the full rate after Hartford, Connecticut, is 36-3, meaning that the charge for 10 words or less is 36 cents and that each additional word costs 3 cents. From the table on the relationship of rates you can compute the cost of any message sent between these two points. Thus a 57-word day letter will cost 64 cents (54 cents plus 10 cents); a 57-word night letter will cost 38 cents (29 cents plus 6 cents plus 3 cents); and a 57-word serial message will cost 80 cents (66 cents plus 14 cents).

SELECTING CLASS OF SERVICE Often a secretary is instructed: "Send a wire." Perhaps she is told after lunch to wire Mr. Adams and ask him to call on a new prospect, the Atlas Waterproofing Company, Tenth and Greene Streets, before he leaves Boston. This places upon the secretary the responsibility of selecting the proper type of service. A full-rate telegram of ten words is almost used up by the six words needed to tell the name and address of the company. By referring to Mr. Adams' planned itinerary, she learns that he is in Boston today and will be there all day tomorrow, so that a fast telegram delivered this afternoon would be little or no better than a message delivered to him early the next morning. She decides therefore to send a night letter of twenty-five words at less cost and to utilize the extra words in explaining the reason a call is requested.

The actual cost of a day letter may be less than that of a full-rate telegram. The table on page 265 supplies this information for each of the full-rate telegram rates. For example, when the full rate is 36-3, the minimum day-letter rate is 54 cents (see second line of table). The third column shows the number of words that could be included in a full-rate telegram before the cost of such a telegram exceeded the minimum charge for a day letter. In this case, the number of words is 16, because at the rate of 36-3, the cost of a full-rate telegram would be 36 cents. Accordingly a message would need to contain fewer than 17 words to make it less expensive to send it as a day letter instead of a full-rate telegram. A secretary who makes frequent use of different types of telegraphic messages can prepare similar comparative tables for the various services.

In selecting the most advantageous type of telegraph service, the secretary must keep uppermost in her mind not only the cost factor but also the time element; that is, such factors as the speed of delivery of the message, the time of day she is placing the message, the season of the year, and the difference in time zones in the United States. When a region of the country is suffering a catastrophe, such as a flood or a hurricane, telegraph wires are loaded in every part of the country by persons inquiring about their relatives, their friends, and their businesses. During such a time, a day letter would probably be held up many hours. Likewise during the Christmas holiday

MINIMUM LENGTHS OF DAY LETTERS THAT ARE CHEAPER THAN FULL-RATE TELEGRAMS

FULL-RATE TELEGRAM RATE	CORRESPONDING DAY LETTER RATE FOR 50 WORDS OR LESS	NUMBER OF WORDS IN A FULL-RATE TELEGRAM WHICH APPROXIMATES COST OF 50-WORD DAY LETTER	NUMBER OF WORDS FOR WHICH IT WOULD BE LESS EXPENSIVE TO SEND DAY LETTER
24- 1.2	$ .36	20	21
36- 3	.54	16	17
43.2- 3	.65	17	18
50.4- 3	.76	18	19
57.6- 4.2	.87	17	18
72- 4.2	1.08	18	19
86.4- 6	1.30	17	18
1.08- 7.2	1.62	17	18
1.44-10.2	2.16	17	18

season telegraph service is heavy. The secretary can save her company a great deal of money by careful judgment in selecting the proper class of service and by carefully wording the messages.

PAYMENT OF TELEGRAPH CHARGES Several methods of paying charges for telegraph services are used. Those who use these services infrequently usually pay cash for each message at the time it is filed. For those who make frequent use of telegrams, the telegraph company keeps a record of the charges and submits a monthly statement. When messages are filed by telephone, they can usually be billed on the telephone company's toll statement, and payment is made to the telephone company, which in turn reimburses the telegraph company.

The telegraph company permits a person to send messages collect; that is, the recipient pays for the sending of the message. College students make use of this service as do some business

chargeable words, the filing of the messages, and the difference in time zones.

CLASSES OF INTERNATIONAL SERVICE The classes of international service are summarized in the table illustrated on pages 268 and 269. International night-letter (NLT) and deferred-message service (LC) are the least costly to use; full-rate, the most costly. A designation of the class of service or indicator must be shown on every message filed except the full-rate. This group of letters indicating the class of service is chargeable as a word in every instance except for code messages. The indicator must precede the address.

CODES AND CIPHERS Because one code word may mean several plain-language words, code language is frequently used in cables. Code words are composed entirely of letters. They may be real or artificial words, but they must not contain more than five letters. In an international message the use of code words lowers the cost of the message. The statements "We authorize you to act for us. Will confirm this by mail." may be covered by the one code word KALOP.

Cipher words are generally composed of figures or of letters exceeding five per group, not fulfilling the requirements of code or plain language. Cipher language is used for secrecy. In a message in cipher language each plain language word and each cipher word is chargeable at five characters to the word.

WORD COUNT Words in plain-language messages are chargeable at fifteen letters to the word. In code (CDE) messages, each group of five letters or fraction thereof in plain-language words and each code word of five letters or less represents a chargeable word.

Each word in the address, the text, and the signature is counted as a chargeable word. For this reason many firms have international addresses of one word to be used in the address or the signature instead of the full name and local address of the company. There is a small annual charge for registering an international address with the telegraph company, but it is an economy if a business firm uses extensive overseas service. Firms planning a frequent exchange of tele-

Class of International Service	Indicator Preceding Address	Charge for Indicator	Precedence of Transmission
Full-rate or ordinary	None	——	Take precedence over all other messages
Code	CDE	No	
Deferred	LC	Yes	Subordinated to full-rate and code messages
Night letter	NLT	Yes	Delivery at destination next morning

graphic correspondence usually select a reversible address—both firms address telegrams to the same code address. This prearranged understanding precludes the necessity for signatures. It is necessary, even with an international address, to give the city of destination in the message. The name of the country may be typed in parentheses on the filing copy of the message, and the telegraph company will not charge for it.

RADIOGRAMS It is possible to communicate with ships at sea by sending a radiogram message in plain or code language from a local telegraph office. Such messages are charged for by the word, including the address and the signature.

REFERENCE READING

Wanous, S. J., and Erickson, L. W. *The Secretary's Book.* New York: The Ronald Press Company, 1948, pp. 279–303.

Language	Word Length	Minimum Number of Words	Relationship of Rates
Plain language or cipher	Plain language: 15 letters to a word Cipher language: 5 characters to a word	None	Rate based upon distance message is sent
Code	Maximum of 5 letters	5	60% to 66⅔% of full rate
Plain language, but code may be used in address and signature	15 letters to a word	5	One half of full rate
	15 letters to a word	25	One third of full rate

QUESTIONS ON READINGS

1. In domestic telegraph messages how many chargeable words are represented by each of the following:

(a) ABCXYZ
(b) F.O.B.
(c) doz.
(d) weare
(e) J.B.R. Simpson
(f) Harold McKinley
(g) South Dakota
(h) #10–AE
(i) $51.25
(j) Buffalo, N.Y.
(k) 11 ½
(l) $8,279

2. Why is it sometimes advisable to use code words in domestic messages?

3. Name the various ways in which telegrams may be filed.

4. Explain the type of service given and the number of words on which minimum charges are based for the following types of telegraphic services:

(a) Full-rate telegram
(b) Serial service
(c) Day letter
(d) Night letter

4. When would you transcribe a telegram dictated with the rest of the day's correspondence?

5. Why do you think it necessary to make at least two carbon copies of every telegram that is filed?

6. What instructions would you include, or what service would you request, in sending a telegram under each of the following circumstances:

(a) To a person en route by train?
(b) To a person who will register at some later time at a hotel?
(c) To either of two persons at the same address?
(d) To a person traveling by automobile who is expecting a message at a Western Union office in a specific city?
(e) On which you wish to know when delivery was made?
(f) Which it is imperative to have delivered exactly as filed?

PROBLEMS

1. Rewrite each of the following telegraph messages, using not more than ten words so that the message may be sent as a full-rate telegram.

(a) THERE WILL BE A SALES MEETING SATURDAY MORNING IN THE OFFICE AT TEN O'CLOCK. PLEASE ARRANGE TO BE THERE.

(b) MR. WILCOX WIRED SAYING HE WOULD BE HERE TOMORROW. IS IT POSSIBLE FOR YOU TO COME BACK?

(c) PLEASE DISCONTINUE TAKING ORDERS ON TA7J. FIND STOCK ON HAND IS DEFECTIVE. LETTER EXPLAINING SITUATION FOLLOWS.

(d) IN ANSWER YOUR TELEGRAM SUGGEST YOU OFFER A 40% DISCOUNT TERMS 2% 10 DAYS.

2. Type each of the following telegrams and determine the number of chargeable words. If a word or a group of letters, figures, and characters represents more than one chargeable word, underscore the item and indicate by a small figure beneath the underscore the number of chargeable words included. Omit spaces where permitted if it will result in savings in word counts.

(a) CHANGE CATALOG GROSS PRICES ON AS123 TO $117.92; 10B19 TO $192.21; 15X102128 TO $85.72.

(b) STOCK EXHAUSTED ON KNRP, KNRPVO, AND VT.

(c) ENJOYED SEEING LOCKS AT SAULTE STE MARIE. HEADING FOR CANADA TODAY. RETURNING TO UNITED STATES 10 P.M. WEDNESDAY. FEELING OK.

CHAPTER 14

HANDLING TRAVEL DETAILS

ALMOST every employer takes business and personal trips. By attending to the numerous details incident to traveling, the secretary can be of real help. These details often include making up an itemized time schedule of the transportation available, typing the final itinerary, making transportation and hotel reservations, securing appointments, and gathering together all of the necessary tickets, funds, and supplies to be taken along. In order to handle these details, the secretary must know the various modes of travel and the services provided by each.

While the employer is away from his office on a trip, the secretary has the responsibility of acknowledging mail and handling other office matters. The employer appreciates having the work on his desk in neat order for examination upon his return.

TRAVEL INFORMATION

Long-distance business travel is usually by train, airplane, or bus. The private automobile is commonly used for short trips.

TRAVEL BY TRAIN

When possible, a businessman travels at night so that his time during the day will be free for business calls and conferences. One reason for the popularity of train travel is that overnight service between many cities is available.

There are two classes of passenger travel by train, Pullman and coach.

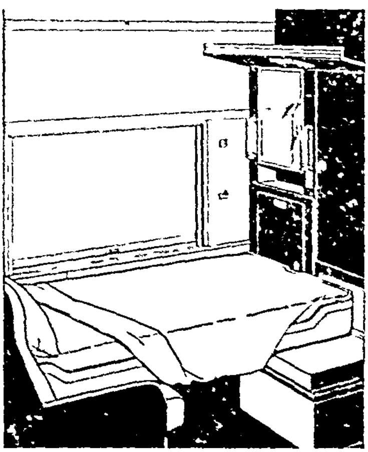
Pullman Services. Practically every passenger train carries one or more Pullman cars. They provide several types of accommodations. For day travel there is the parlor or chair car containing comfortable swivel armchairs. For night travel or

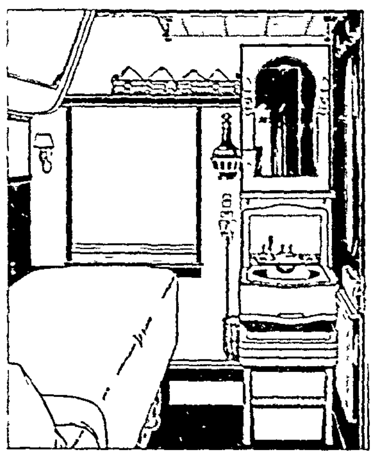
Express Company offices, travel bureaus of banks, and other travel agencies. Reservations can be canceled or returned up to a certain specified time before departure.

Coach Services. Coach travel is less expensive than Pullman. A coach ticket entitles the passenger to transportation in a *coach car*—one with standard seats.

No reservations are necessary for travel in ordinary coaches. They are necessary, however, on the special, de luxe all-coach trains operated by some lines. The seats in these coaches recline, and the lights are dimmed at night so that the passengers may sleep in their seats. There may be a slight service charge for reservations on a de luxe coach train.

TRAVEL BY AIR Many businessmen prefer to fly because their travel time is so brief in comparison to that spent in going by train or bus. However, a trip planned by air always has an element of uncertainty since the flight may have to be canceled because of weather conditions. The employer makes his choice on the basis of air speed or certainty of train departure, depending upon the nature of his trip.





PULLMAN ACCOMMODATIONS

On the left is illustrated a roomette made up for sleeping. The bed is raised into the wall during the day, thus leaving the seat open for occupancy. The right-hand illustration shows a bedroom at night. During the day the bedding is removed to provide an extra-wide seat.

Railway Timetables. Each railway timetable booklet includes an index to stations, as illustrated below, giving the numbers or letters of the individual timetables in which service to a city is listed. In order to learn quickly which tables list service between the points wanted, look up both cities in the index and jot down those table numbers or letters that are common to both.

C

Cadillac, Mich. K, 32, 33
Cambridge City, Ind 3, 6
Camden Ind ...23, 29
Camden Ohio 21
Camp Dennison, Ohio . 17
Canandaigua, N. Y. 14, 31
Canonsburg Pa . 19
Canton, Ohio A F, 1, 2, 12, 16
Cape Charles, Va 41, 42
Cape May, N J ...36
Carnegie, Pa .3, 6, 18, 19
Carp Lake, Mich. 32
Carrothers Ohio .. 12
Cartersburg, Ind 3, 6
Casey, Ill . . . 3, 6
Cedar Springs, Mich. 32
Cedarville, Ohio . 17
Centerburg Ohio.. 15
Center Road, Pa... 13
Cherry St (New Castle), Pa 13
Chester, Pa 40, 43
Chesterville, Ill .. 30
Chicago Ill A F, G, J, L, M, N, 1, 2, 21, 22, 23, 24, 25, 26, 27, 32
Cincinnati Ohio C, D, K, M, N, 15, 16 17, 21, 22, 32
Clayton Ind . 3, 6
Clearwater, Fla . N
Cleveland, Ohio A, G, H, N, 9, 10, 14
Clinton, Ohio..... 15

I

Ind Harbor East Chicago (Hammond), Ind F, 1, 2
Indianapolis, Ind B, K L, N, 3 4 6, 7, 15 23, 29 32
Inwood, Ind. ...1, 2
Irondale Ohio.... 11
Irwin Pa.......45, 46
Isabel, Ill......... 30

J

Jacksonville, Fla ....N
Jamestown, Pa... .13
Jeannette, Pa . 45, 46
Jeffersonville Ind.. 23
Jersey City, N J, A, B, C, E, H, 40 43, 45, 46
Jersey Shore, Pa.... 14
Jewett, Ill 3, 6
Jewett, Ohio ... 3, 6
Johnstown, Pa. A, B C, E, H, 14, 20, 45 46
Jonesville, Ind..... 23

K

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Kalkaska, Mich.. 32
Kane, Pa. . 31
Kemp Ill 30
Kendallville, Ind... 32
Kensington, Ohio... 11
Kewanna, Ind 29
Killbuck, Ohio. .. 15
Kingsley, Mich .. 32

L

La Crosse, Ind 24
Lafayette Ohio ..1, 2
La Grange Ind.... 32
Lake Alfred Fla N
Lake City, Ill 30
Lakeland Fla ..... N
Lakeville Ohio ...1, 2
Lancaster, Pa. A, B, C, E, H, 20, 45, 46
Lansing, Ill 24
La Otto Ind 32
La Paz Jct., Ind.... 23
Larwill, Ind 1, 2
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Lebanon, Ind . 23, 29
Leetonia, Ohio.....1, 2
Le Roy, Ind....... 24
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Lima, Ohio .A, 1, 2
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London Ohio. 3 6, 17
Long Branch, N J 36
Loudonville, Ohio 1, 2
Louisville, Ky B C K L, N, 15 23, 29 32
Loveland, Ohio 17
Lovington, Ill ... 30
Lowellville Ohio... 10
Lucas Ohio 1 2
Lucerne Ind 29
Lynchburg, Va .... M
Lynn, Ind..........32

PORTIONS OF AN INDEX TO TABLES

To find which tables list service between Chicago and Louisville, Kentucky, refer to the partial index illustrated. For Chicago, timetables A, F, G, J, L, M, N, 1, 2, 21, 22, 23, 24, 25, 26, 27, and 32 are listed; for Louisville, timetables B, C, K, L, N, 15, 23, 29, and 32. Therefore, tables L, N, 23, and 32, which are common to both cities, will list services between them.

To nontravelers, reading a timetable may seem difficult. Some persons are confused over the "read down's and up's," with the different face types indicating a.m. and p.m. time designations, and with the numerous footnotes. Every time-

table, however, fully explains the meaning of every symbol and type face used. By carefully studying one or two timetables, it is possible to develop a facility in using them.

Examine the railroad timetable illustrated on page 278. The columns on the left side list departure times for trains from Chicago to Louisville, and those on the right side for trains from Louisville to Chicago. This arrangement is the explanation for the necessity for reading down the columns on the left side and up the columns on the right side.

The time printed in heavy black type is p.m.; that in lightface type is a.m. A small letter preceding the time, such as f2.26 (fourth column from the left), or a letter within the time (placed there to save space), such as 10f49 (second column from the left), is a reference mark.

The number at the top of each column refers to the train number. It is necessary either to know this number when making a reservation or to know the exact departure time so that the reservation clerk can find out the train number. If the train is also named, such name is either printed at the top of the column or within the column. In the illustration note that Trains No. 308 from Chicago and No. 309 to Chicago are called "The South Wind."

Certain trains do not run every day. Those that do are indicated as *Daily* in the column heading; those that do not are explained in footnotes. In large cities there are usually several stations. In that case the name of the station is shown after the name of the city. For example, (*Un. Sta.*) after Chicago in the center column of the illustrated timetable indicates that the Union Station is used.

Some trains have dining cars, some do not; some have complete Pullman accommodations, others have none. To indicate the accommodations available, a separate table is shown or footnotes are used to list them for each train. According to the illustrated table, Train No. 326 has coaches only from Indianapolis to Louisville. Train No. 306 has several kinds of sleeping accommodations—sections, drawing rooms, roomettes, double bedrooms, etc. Breakfast can be had en route because a cafe car is on the train from 4:45 a.m. to 7:40 a.m.

The center two-page spread of the booklet is usually given over to a map of the railroad route. A study of it is frequently

Each air-line booklet carries a schedule of ground transportation times and charges, and a concise statement of general information of interest and importance to the passenger, such as "Many fountain pens will leak when an altitude of 8,000 feet or more is reached. To avoid damage, it is suggested that fountain pens be emptied or filled completely before boarding the plane or that they be wrapped in cloth."

The secretary to a frequent traveler should obtain and keep on file current copies of timetables of all transportation lines serving the city.

Official Railway Guide. The *Official Guide of the Railways* is a compilation of all timetables of all railway lines and the latest air-line schedules. It is the standard reference book of ticket agents. Some business firms purchase copies of it for the use of their employees who travel. It is published monthly and has an annual subscription price. Many offices, however, purchase only occasional single monthly copies because the information that is obtained from even the latest copy must be verified by calling the local ticket office.

Attending to Travel Details

The groundwork for planning a trip will probably be laid during a conference between the employer and the secretary. He will mention the places to be visited and the dates, and perhaps he will specify names of hotels. For example, he may tell the secretary that he plans to attend a convention in New York City on October 2, 3, and 4, with headquarters at the Hotel New Yorker; that on October 5, he is to give a luncheon address in Philadelphia; and that he wants to stop in Baltimore and Pittsburgh to visit certain customers, for which stops the secretary is to arrange definite appointments; and finally, that he must be back in the office in Cleveland by October 9.

SCHEDULE OF SERVICES AVAILABLE The railroad will draft an itinerary for the traveler, but in business offices this responsibility frequently falls to the secretary. A tentative routing may be planned first. In this instance the secretary must route her employer to New York, Philadelphia, Baltimore,

Cleveland to New York

Via	Name or No.	Leave Cleveland	Arrive New York
Penn (Union Station)	316–22	6:20 p.m.	7:00 a.m.
	38	8:00 p.m.	8:05 a.m.
New York Central (Union Terminal)	Interstate Express	5:45 p.m.	7:20 a.m.
	Fifth Avenue Special	6:55 p.m.	7:45 a.m.
	Cleveland Limited	8:15 p.m.	8:00 a.m.
United Airlines (airport)	16	6:06 p.m.	8:48 p.m.
	38	10:06 p.m.	12:26 a.m.

SCHEDULE OF SERVICES AVAILABLE PREPARED IN MEMORANDUM FORM

This schedule shows convenient times of departure with respective times of arrival.

AUTOMOBILE ITINERARIES

When the employer elects to drive, the secretary's problems in arranging an itinerary are quite different. The sources of information then are the up-to-date state road maps such as those published by Rand McNally. If the employer is a member of an automobile club, the secretary should call on that organization to prepare the routing. It has the latest information available on new roads, detours, and best routings.

If the secretary must arrange the itinerary, she should proceed along these lines:

(1) Sketch out the route on the road map, preferably drawing a heavy colored line over the roads to be covered.

(2) Type the itinerary showing the towns to be passed through, the highway numbers to be used, and the stops to be made.

(3) Give both the charted map and the itinerary to the employer.

The thoughtful secretary will list on the itinerary the wave lengths of near-by radio stations. If the route passes through particularly historic or scenic country, she will include the points of interest that the employer might wish to visit. These items are usually included on the road maps.

The man who uses his car for business purposes usually has property damage and liability insurance. The secretary should check to see that accident report blanks are either in the employer's car or among his papers. Other necessities for automobile travel are a driver's license and proof of ownership of the car. The former must be presented in many states in any traffic altercation; the latter must be presented when crossing national boundary lines and some state borders. If the employer is a member of an auto club, he should carry his membership card, for it may entitle him to tire changing, towing, and other road services.

HOTEL RESERVATIONS The secretary is usually expected to make the necessary hotel reservations for her employer. In many cases the employer will provide the names of the hotels to the secretary, or she may know which hotels the employer prefers.

When the secretary is expected to select the hotel or to provide information about suitable hotels in a certain city from which the employer will make a selection, she can use one of the hotel directories. One widely known directory is the *Hotel Red Book,* which is published annually by the American Hotel Association. It includes, for each hotel that is listed, the number of rooms, the rates, and whether the hotel is operated under the European or American plan. When a hotel is operated on the European plan, the rate includes the cost of the room only. Under the American plan, the rate

includes the cost of meals as well as the cost of the room. Most commercial hotels are operated on the European plan. The information in the directory is arranged alphabetically, first by state, then by city, and then by names of hotels or inns. After the name of the city, the population is given, as well as the names of the railroads serving the city.

The room rates that are quoted in the directory are for one day. Many hotels offer a reduced day rate for occupancy of a room during the daytime only. This service is desired by some businessmen who wish to use a hotel room as daytime headquarters when they are traveling at night.

If a hotel reservation is made some time in advance of the date of the trip, a letter can be used very satisfactorily for the request. The information contained in the letter should be very specific, indicating the kind of room desired, the type of accommodations, the approximate rate that the employer wishes to pay, the number of persons in the party, the number of rooms if the information is necessary, the date of arrival, the approximate time of registration if that information can be given, and the probable length of time that the reservation is desired.

If it is necessary to make a last-minute hotel reservation, the secretary can do so by telegram or telephone.

The American Hotel Association has a standard code, which may be used in telegrams to reduce the cost of longer messages addressed to member hotels. This standard room reservation code appears on the two pages preceding the inside back cover in the *Hotel Red Book.*

Some hotels acknowledge all requests for reservations. Others send a confirmation only when it has been specifically requested. The secretary should request a confirmation each time, and the correspondence pertaining to hotel reservations should be attached to the employer's itinerary. If a hotel's record of the reservation should be misplaced, the correspondence pertaining to it can be submitted by the employer as evidence of the reservation.

TRAVEL FUNDS

In order to obviate the carrying of large sums of money, travelers' checks may be purchased. They are sold by the American Express

Company in denominations of $10, $20, $50, and $100. If the employer intends to take $500 on his trip, he may purchase $400 worth of travelers' checks in the denominations he wishes, say $50 and $100. Each check is numbered and printed on a special kind of paper. The purchaser signs each check on a line near the top before an agent of the Express Company. In order to cash one of the checks, he takes it to a business concern, bank, hotel, or American Express office and signs the check again at the bottom before the person paying out the money. Such checks are as acceptable as cash and constitute almost personalized money, because a person to whom they do not belong would have to forge the purchaser's name on each check in the presence of another person in order to cash them. Since travelers' checks must be signed by the user, the secretary cannot secure them for the employer. Travelers' checks are also sold by banks.

Hotel credit cards are another means of securing cash while traveling. To a guest with an established credit rating, the hotel furnishes a credit card. He may present this with his personal check regardless of what bank it is drawn on, and the check will be honored by the hotel cashier. Often a credit card on one hotel will be honored by another hotel.

If the employer should find himself without funds, he can always wire his secretary to send him a money order by telegraph. This can ordinarily be transmitted within a very short time because it involves only an exchange of telegraphic messages. Identification cards are furnished to persons who make frequent use of this service.

Sometimes the secretary acts as an advance money agent who supplies the traveling men of the firm with funds through express money orders. Travelers' checks cannot be used for this purpose because they must be signed at the time of their purchase by the person who is to use them. In order to facilitate the cashing of express money orders, American Railway Express furnishes identification cards, which include the signature of the bearer.

ADDITIONAL TRAVEL NEEDS The traveling employer will need several items in addition to the schedule of services available, the itinerary, tickets, maps, insurance

blanks, auto club membership card, and travel funds. Naturally he will need papers and correspondence pertinent to any visits or calls he will make. These papers should be logically arranged in folders and plainly marked so that they can be found easily. He may need such supplies as stationery and stamps. He may want the secretary to secure some interesting reading matter. She should ask him if he is carrying his credit and identification cards. It is definitely the secretary's responsibility to check with the employer on each trip to see that he has all of the pertinent necessities with him.

DUTIES DURING ABSENCE OF EMPLOYER The secretary's performance while the employer is away is just as important as when he is present. Other employees are quick to notice whether she is keeping busy or frittering away time. When the employer returns, he will be grateful and pleased if she has taken care of the routine matters, kept records of office activities for his review, and has arranged the matters that need care in the order of their importance.

The secretary must take responsibility while the employer is away. She need not shoulder this alone. It is sometimes better judgment to discuss some of the problems with the employer's superior or one of his co-workers. Routine matters, of course, should be taken care of promptly. The material accumulated for the employer should be sorted into two groups:

(1) All matters taken care of by the secretary or others should be placed in one folder marked with some indication as "For your information," "For record," or "To be filed." Just before the employer's return, these should be sorted into some logical order.

(2) Work that must be handled personally by the employer. These items should be placed in a folder marked "Action" or "Important" and should be sorted prior to his return.

Although in some instances it may be of more interest than importance, the employer likes to know who telephoned or visited him during his absence. Such notes may be made on the secretary's or the employer's daily calendar, but they should be summarized for his return. A list of appointments and engagements made for the future should be placed in the "Important" folder to call his attention to them.

When an employer is away from his office for some time, he may wish to have forwarded to him copies of incoming letters that require his personal attention. The secretary may also send him reports on other matters, such as important inquiries or calls made in person or over the telephone. Furthermore, although he probably will not request the secretary to do this, he will appreciate receiving from the secretary a letter or memorandum reporting interesting events and developments in the office.

EXPENSE RECORDS Some firms advance funds to a traveling employee. Periodically or on his return, he submits a complete record of his travel and the expenses incurred. In other companies employees advance their own funds and are reimbursed later in accordance with the expense record submitted and approved. In either case the employee must keep an accurate record of the dates and times of travel, the conveyances used, and the costs. He sometimes must submit receipts for hotel and Pullman accommodations. His word is usually taken for the amount of taxi fares, meals, and tips, but they must usually be listed or itemized.

If it is the secretary's duty to make up the expense record for submission, she may literally have to "mine" the records and the receipts from the employer, for it is a task he may postpone indefinitely, assuring her the work on his desk is much more important. Expense account forms are usually provided by the company and need only be filled in correctly and completely and totaled. The secretary should, however, check the employer's present accounting with previous reports to make sure that his amounts for taxis, meals, etc., are in line and that the rail and plane fares are correct. Reimbursement is frequently held up until all items are in line as approved by the auditor's office. The Treasury Department of the Federal Government is very particular regarding unreimbursed travel expenses on income tax reports; each voucher is submitted to a strict examination.

NO REFERENCE READINGS FOR CHAPTER 14

QUESTIONS

1. Why may an employer prefer to make a trip on an overnight train in a Pullman when a special de luxe air-conditioned, all-coach train is available to the same destination during the day at regular coach fares?

2. Using the illustration of a portion of an index to stations in a railroad timetable booklet, on page 277, which timetables would you refer to for service between:

(a) Chicago and Cincinnati?
(b) Cleveland and Lancaster, Pennsylvania?
(c) Indianapolis and Johnstown, Pennsylvania?
(d) Louisville and Lebanon, Indiana?

3. Of what value to the secretary is the Official Railway Guide if she must call the local ticket office for a verification of arrival and departure times of trains?

4. What information would you need from your employer before you could arrange travel accommodations and prepare the itinerary for a trip he is planning?

5. When should a schedule of available services be prepared before the itinerary is typed? When is such a schedule unnecessary?

6. Under what circumstances do you think that your employer's schedule of appointments during the trip should be typed separately and attached to the itinerary?

7. Why should copies of itineraries of salesmen and executives be retained by the secretary?

8. Are hotel reservations for the employer necessary except during holiday periods?

9. What are the advantages of hotel credit cards?

10. If your employer has not indicated a preference and you are not familiar with the hotels in a city which he will visit on a business trip, what book would you consult for the information you need?

11. What information should you include in a letter requesting a hotel reservation?

12. If the secretary makes occasional business trips, in how much detail should she keep her expense record?

13. What commercial agencies are available for assistance in planning trips to be taken by automobile or ship?

DISCUSSION QUESTIONS

1. While your employer is away on a trip, you are borrowed for secretarial work by one of the other executives because his

secretary is ill. His position is on a higher level than that of your employer. (a) Upon your employer's return would you tell him in detail about the work that passed over your desk? (b) If the executive had asked you if you would like to be his secretary permanently, would you tell that fact to the employer when he returned? (c) Would you tell the situation in (b) to the other office girls? (d) If the executive seemed careless in the handling of his work, would you tell that to your employer?

2. Your employer is visiting a dissatisfied customer in a distant city. He telephones you to mail him at once the entire correspondence file relating to this customer. There is a strict company rule that no files can be taken from the building. What would you do?

3. In planning an itinerary for your employer, what factors would determine whether the trip should be made by rail or air?

4. What responsibilities has the secretary in following through on the preparations for a business trip for her employer after the itinerary has been established?

5. What criteria should the secretary use in determining what mail should be forwarded to her employer while he is away on a business trip? What procedure should she follow in forwarding the mail?

6. If your employer was away on a business trip, would you think it an opportune time to take a day off for shopping? Would your answer be different if you were working in a large office instead of in a small professional office?

7. Just after your employer left on a somewhat lengthy business trip by train, you discover that he has forgotten to take along his itinerary, reservation letters, and appointment schedule. What would you do?

8. Would you notify your employer if the top executive of your company suddenly became seriously ill while your employer was on a month's vacation at the seashore?

PROBLEMS

1. Your employer raises the following questions. The answers can be found in the timetable illustrated on page 278. Write the answer to each question in memorandum form, that is, in a brief but clear way, so that you can take it in to him in written form.

(a) When can I leave Indianapolis for a 9:00 a.m. appointment in Louisville?
(b) Can I have lunch and dinner on the 12:45 train out of Louisville for Chicago?
(c) How early can I get on Train 306 out of Chicago, and how late can I stay on in Louisville?

PART IV

SECRETARIAL PREPARATION OF BUSINESS REPORTS

E. I. Du Pont de Nemours

CHAPTER 15

LOCATING BUSINESS INFORMATION

A SECRETARY can earn admiration and gratitude from the employer by finding answers to factual questions and by locating and abstracting published information on a particular subject. This is a somewhat new service expected of the intelligent, college-trained secretary—of the girl who is eager to expand her techniques and who is willing to put forth more than routine effort.

An answer to a factual question can sometimes be found in the reference and business publications available in the secretary's own office; if not, it can be obtained from the local library. If both sources are unproductive, a written inquiry can be addressed to a larger or specialized library in another city.

To collect general and detailed information on a specific subject requires time and intelligent effort. It means going to the library; searching through the catalog, guides, and bibliographies; scanning and appraising the selections made; and finally putting the information in convenient form for the employer to use.

INFORMATION SOURCES WITHIN BUSINESS OFFICES

Specialized source material on subjects of interest to your particular company will very likely be available within your office, but similar source material on other fields will be found only in the library. The different kinds of business publications are discussed individually under the same broad classifications under which they are found in a public library.

TRADE ASSOCIATION PUBLICATIONS Businesses and persons engaged in like endeavors have found it mutually helpful to form trade associations and technical organizations to provide themselves with a center of current information. The largest trade association in the United States is the National Association of Retail Grocers. In addition, grocers engaged in

they are edited by experts who know their readers' interests and problems. In variety and number they comprise the largest source of business information.

These periodicals can be broken down into several broad classes, as listed below with typical publications under each.

For general reading—of interest to all: *Business Week, Fortune, Survey of Current Business, Nation's Business*

For specific industries—of interest to management, production, and research workers: *Textile World, Bankers Monthly, Women's Wear, Iron Age, American City*

For management—of interest to specific department heads: *Sales Management, Personnel*

For financial activities: *Wall Street Journal, Commercial and Financial Chronicle*

The trade press also brings out special publications such as yearbooks, statistical summaries, directories, compilations on buying power, and so forth.

Your local library will undoubtedly have the *Industrial Arts Index*, which lists by subjects the articles appearing in over three hundred of these business magazines.

INFORMATION SERVICES Many business organizations and professional men subscribe to information services that furnish comprehensive, current information and that are brought up to date at necessary intervals by the publisher. Services are likely to be in loose-leaf form so that superseded pages can be destroyed and new and additional ones inserted easily, such as in a tax or law service. It is frequently the secretary's duty to see that the new material is filed in its proper place in the service according to the instructions sent by the publisher with each supplement.

Other services are published in book form such as *Dun and Bradstreet's Ratings and Reports*, which service, incidentally, is considered a confidential one and cannot, therefore, be purchased by libraries for public use. Still other information services are published in pamphlet or letter form like the *Kiplinger Washington Letter*.

These information services are usually furnished for the use of all employees, and the secretary will want to become ac-

quainted with those in her office, learning the kind of information given and the way it is presented. She can often go to the service and find the answer to the employer's question or locate the material for him to examine.

DIRECTORIES

If you are secretary to a lawyer or to an insurance man, you may be asked to locate or trace the address of an individual by a search through directories in your office or on file somewhere in your city. Current and back issues of city directories are kept at libraries for the convenience of business users. They are basic sources of reference in establishing claims based on residence, in granting credit, in tracing missing persons, and so on. It is possible the library collection of directories will contain not only the local city directory but also directories of all of the cities in the state and of the major cities in the rest of the country. However, some of the very large cities no longer have directories published so that telephone directories must be used in their stead.

Some of the directory publishing companies maintain in their own libraries a large collection of city directories, which they sometimes permit the public to use. Some of them will even answer telephone inquiries. However, if a user wants to compile a long mailing list from the publishing company's directory collection, a charge is usually made.

There are also hundreds of classified directories serving many fields as you can see from the following: (1) those that list individuals according to their occupations, such as the *American Medical Directory* giving all legally qualified physicians in the United States and Canada; (2) those that provide biographical sketches of selected individuals, such as *Who's Who in America;* (3) those that list all of the businesses or service institutions engaged in similar or related enterprises, such as *Thomas' Register of American Manufacturers* and *Polk's Bankers Encyclopedia;* and (4) those that list products, equipment, and supplies of allied industries by trade names.

GOVERNMENT DOCUMENTS

Some government publications may be subscribed to or purchased by your company. Others will be found on file in the reference department

or business section of the public library, or in the municipal reference library in your city—all depending upon the subject matter. Our government is a prolific publisher. Each agency, each bureau, each department publishes statistical, factual, interpretive, and research reports. They are, to quote the largest business library in the country, "a major source of information" for the businessman.

If you are working in a city having a public document library (which collects all of the material published by the government), you can always turn to it for government publications. Otherwise you will go to one of the libraries or departments mentioned above.

Should your secretarial position be in the marketing field, you would want to know how to use the census volumes and to make a survey of the publications of the Departments of Commerce and Labor, which publish vast amounts of authoritative data from which a marketing expert can determine and interpret trends, select likely locations for selling certain products, and so on.

If your employer should want to lobby for, or express his opinion on, a particular political issue, it would be necessary for him to direct his remarks to the proper person or agency. You can find the name of the member of Congress in the *Official Congressional Directory* or the name of the agency in the *United States Government Manual*, which outlines the functions and organization of each Federal agency.

The government-document source of business information covers so many subjects that you will find it interesting and informative to study when you are settled in your particular field of work.

MAPS AND ATLASES Maps are used for charting and as visual aids in planning. An enlarged map of a certain area may be polka-dotted with colored pins to show the locations of things of importance to the owner. As a secretary, you might very well be expected to keep such a map up to date by inserting a pin for every new city in which your company arranged for a distributor or service agency.

An atlas is a collection of maps and statistical information regarding populations and geographic areas. *The Commercial*

Atlas and Market Guide, published by Rand McNally, is subscribed to by many businesses. It contains not only geographic maps but also many economic maps as well. It really constitutes a map service because revised and new editions are furnished throughout the year. When a subscription is stopped, all material must be returned to the publisher.

DICTIONARIES The dictionary, you say, is an already familiar reference source greatly depended upon by secretaries. You are, of course, right; but you should know that the best desk dictionaries are *Webster's Collegiate Dictionary*, Random House's *The American College Dictionary*, and Funk and Wagnall's *Practical Standard Dictionary*. You probably do not know that there are also special dictionaries, such as a bilingual one for use in writing and translating foreign correspondence, and technical dictionaries, such as Warren's *Dictionary of Psychology*. You will also find a good reference source of technical words to be the glossaries in textbooks in the employer's library.

If you feel the need of a book of synonyms, go to the library and examine the following ones to see which would be of most use to you: *Webster's Dictionary of Synonyms*, *Fernald's English Synonyms and Antonyms*, or *Roget's Thesaurus*.

BOOK INDEXES Occasionally the secretary may find it necessary to secure information on where to purchase a book that is not available in her office or in the local libraries. In such a case, refer to *The United States Catalog* (which is in every public library) and to its periodic supplements called the *Cumulative Book Index*. These publications list each book by author, title, and subject and supply information about the publisher, the size of the book in pages, and the price. For special fields there are separate book indexes such as the *Accounting Index* and the *Engineering Index*.

YEARBOOKS Yearbooks are annual reports or summaries of statistics and facts. *The World Almanac*, which is the most popular book of this type, is published annually by the *New York World Telegram*. One reference librarian has said, "Give me a good dictionary and

The World Almanac and I can answer 80 per cent of all questions asked me." *The World Almanac* contains many pages of statistics and facts, preceded by an excellent index. It covers such items as stock and bond markets; notable events; political and financial statistics of states and cities; statistics on population, farm crops, prices, trade and commerce; educational data; and information on the postal services. Because of its wide coverage and low price, the secretary might request the employer to purchase a copy of *The World Almanac* for office use.

The Statesmen's Yearbook contains statistics and facts on each country's history, geography, government, finance, and commerce, listed alphabetically by country. It is more comprehensive and detailed than *The World Almanac* on such subjects.

The Statistical Abstract of the United States, published annually by the United States Printing Office, is a digest of data collected by all statistical agencies of the national government as well as those of a considerable number of private agencies and several states. It gives authoritative data on area, population, education, wages, etc. Every ten years the Federal government publishes an abstract of the last preceding census. *The Abstract of the Sixteenth Census* is based on the 1940 census. Both of these abstracts are basic reference sources for businessmen, economists, social scientists, and statisticians.

A state manual is published by each state. The *Blue Book of the State of Illinois*, for example, carries a history of the state, the names of current state officers, the organization and the function of state government, and synopses of bills passed.

HANDBOOKS

Handbooks are published for many fields of endeavor and some of them are very helpful to the secretary. Among them are the following:

Webster's Dictionary of Synonyms or Fernald's *English Synonyms and Antonyms*.

Bartlett's Familiar Quotations or *Hoyt's Cyclopedia of Practical Quotations*.

A Manual of Style, The University of Chicago Press.

Robert's Rules of Order for parliamentary procedure.

Emily Post's *Etiquette*.

Working at the Library

In many cities there are several libraries in addition to the public library. The local chamber of commerce, for example, usually has a library on commercial and industrial subjects for its members. Often a private industrial firm maintains a specialized library on the subjects of its materials, products, and manufacturing processes for the use of its employees.

Larger hospitals have up-to-date material on medical and surgical subjects for the use of their staff doctors. Members of the legal profession are served by special law libraries in the county and Federal court buildings. Many cities provide municipal reference libraries for the use of the public as well as the city employees. Certain cities, as mentioned before, have public document libraries, which are depositories for the materials published by the Federal Government. These may be under the supervision of the local public library, but they are classified as special libraries.

Universities and colleges have one or more libraries on their campuses. Art, historical, and natural history museums have specialized libraries for the use of the public and students. Some newspaper offices have comprehensive library collections, which may be open to limited public use.

TELEPHONE INQUIRIES The reference department of the public library will very likely give answers to reference questions over the telephone. The librarian takes the question, looks up the answer, and calls back with the desired information if it can be found. Naturally, only questions that can be easily answered are accepted, such as the correct spelling or pronunciation of unusual words and names, biographical facts, or simple statistics.

One secretary learned that one of the company's traveling representatives had been taken to the White Memorial Hospital in or near Los Angeles. The exact location and address of the hospital were needed in order for the secretary to reach him by mail. To obtain the information, she called the reference librarian who looked up the location and address in a directory of hospitals while she held the line. Another secretary spilled red ink on the painted wall near her desk. The librarian told

her how to remove the spot. Still another girl was instructed to write an engineering trade journal whose name she knew only generally. She asked the library for the correct name and address of the magazine. The information was found in a directory of publications and telephoned back within five minutes. If the public library in the secretary's community renders telephone reference service, and if the secretary has frequent need for such service, it is only courteous for her to visit the library and introduce herself to the person in charge of the reference desk.

Some special libraries also render telephone service, especially when the question is such that it can be answered with little time and effort. Special libraries with individual telephone numbers are listed in the classified section of the telephone directory. Those that are operated as a part of other organizations may not be listed in the telephone directory because they do not have separate outside telephone connections. The employer may know some of the special local libraries, but it is unlikely that he is familiar with all of them. The secretary, therefore, should consult the latest edition of the *Directory of Special Libraries*, make up a complete directory for her city, and file it in her office desk manual. She will undoubtedly find a copy of this directory at the public library.

USING LIBRARY FACILITIES

When a subject requires extensive searching or considerable listing and copying, the secretary generally goes to the library to do the work. There her first task is to gather together the material to be examined. This is accomplished by referring to the various library indexes and selecting the titles of publications that appear to contain pertinent information.

A first consideration in selecting material for examination is its date of publication. If current information is desired, an article on vitamins published ten years ago would be of little value; but biographies twenty or thirty years old on the life of Benjamin Franklin would be worth looking into, for biographies are timeless.

Locating Information in Magazines and Newspapers. Material on current topics is usually found in magazines and newspapers. The best index on general magazines is the *Readers' Guide to*

Periodical Literature—a cumulative author and subject index to articles appearing in periodicals that are on file in almost all main public libraries. For each article the name of the publication, the volume, page numbers, the date of issue, the title of the article, and the author are listed. The *Industrial Arts Index* covers trade magazines.

For newspaper references the *New York Times Index* should be consulted. Supplements of this index are published monthly and cumulative editions, annually. In it the entries are arranged alphabetically under name or subject. Each entry lists the date, the page, and the column as an aid to locating the article. The entry *Je 12, 16:4* refers to an article in the June 12 issue, page 16, column 4. The index serves as a key to other newspapers by supplying the dates of publication of general and international news.

The Library Card Catalog. The chief library index of books is the *card catalog.* This is a card file that shows the contents of the library just as a book index shows the contents of a book. In the catalog there are at least three index cards for each book; one card is filed by the author's name, one by title, and one or more by subject classification. Many of the cards contain "See also" notes, which indicate where similar or related information may be found.

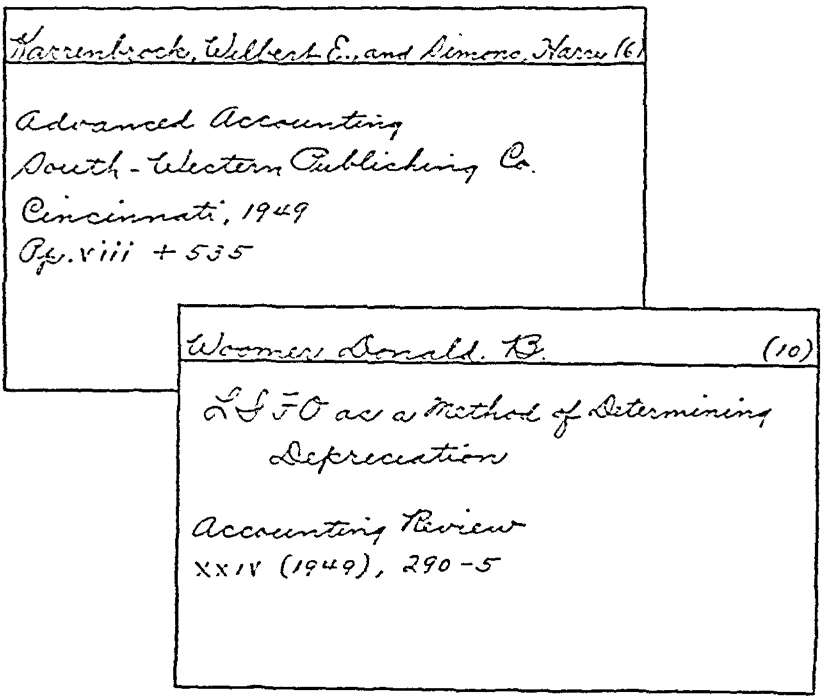
As the secretary checks the index cards, she should make up a list of books, identified by catalog numbers, that she wishes to examine. She will save time in the long run if she will make a record of the subject divisions of the catalog she has checked and identify briefly each catalog number by title, author, and date of publication. This information is particularly helpful when the library is unable to supply at the moment all of the published material she has requested. By checking the descriptions of the books that are not available, the secretary can determine whether they are important enough for her to make another trip to the library.

The Dewey Decimal System. The secretary will probably find the books in the library numbered according to the Dewey Decimal System to which reference is made in the chapter on filing. An understanding of the library numbering system

used should enable the secretary to locate materials on the shelves more rapidly. Much of the material that she is seeking, however, will need to be located and brought to her from the stacks by one of the library assistants.

Selecting Materials. The secretary should check quickly each of the books that she has selected by examining the table of contents and the index. By doing so, she can save time and effort in locating relevant matter or in deciding that the publication can be laid aside as unproductive. In the text each sentence or paragraph that is especially applicable may be tentatively checked or marked with a light vertical pencil line in the outside margin. This pencil mark should be erased later.

Preparing Bibliography Cards. For each reference selected for study, prepare a bibliography card. This is a 5″ x 3″ card



BIBLIOGRAPHY CARDS

The proper listing of books is illustrated by the card with source number 6. The other shows the listing of a magazine article.

on which are recorded the library call number, the author's name, the title of the publication (and article if it is in a magazine), the publisher, the date of publication, and the location of the reference. Number the cards in the upper right-hand corner in sequence according to each new source used. The number that is thus assigned to a particular source is used to identify all notes that are taken from it. This method saves a great deal of time in identifying the source when the references are copied or abstracted; besides, the cards serve as a permanent and detailed record of the sources used.

Taking Notes. The secretary is now ready to study, evaluate, and accept or reject material, and to record the references on individual sheets or cards, 6″ x 4″ or larger. The advantage of using cards or sheets of uniform size, instead of a shorthand notebook, is that the complete set of references can easily be sorted into a logical sequence for use in drafting both the outline and the report. It is best to take notes on all material that seems of probable value to the secretary. Ordinarily only one side of the card or sheet is used, and the information is limited to one specific topic.

Each reference should give the following information in some standardized form similar to that illustrated on page 307:

(a) The source, indicated by the same number as on the bibliography card.

(b) The topic, given a conspicuous position as it describes the nature of the reference.

(c) The information, written either as a direct quotation or a summary statement. If a direct quotation, copy it word for word and enclose in quotation marks. Indicate each omission from the original by an ellipsis.

(d) The page number, written in either of the bottom corners.

Abstracting. Reducing a paragraph or a section of printed matter to a complete but brief summary is called *abstracting.* A reference in abstract form should be identified as such, and the source and page number from which it was taken should be indicated. Inasmuch as the secretary can save the employer a great deal of reading time by preparing good abstracts,

Working papers for the preparation of (6)
Consolidated statements – Equity method

"Dividends that reduce surplus during the period . . . would be reported as a separate debit item even though a charge may have originally been made directly to surplus."

p. 318

SECRETARY'S NOTES

A reference on a single topic copied from page 318 of source 6. Only the first line of the topic is underlined in this form.

she must develop the ability to pick out the salient points and to express them in summary form.

The first step in abstracting is to read the material to get the gist of it. If the article is long, it may be wise to divide it into sections and then to abstract each section. The important phrases or sentences on each page may be lightly checked in the margin on the second reading. Then the important sentences are copied verbatim or summary statements written.

Copying Material. Unfortunately, the secretary usually cannot use a typewriter in the library for the laborious work of copying. Pen and pencils, cards and notebooks are her only tools. If the secretary is taking verbatim notes on a single article or copying a statistical table, she probably will find it advantageous to use her stenographic notebook. The text matter can be written in timesaving shorthand, and the notes can be filed as a permanent record. If the article or the table is so long that it may take the secretary a day or two to take notes and transcribe them, she should ask the librarian for permission to photostat the original material. This is a simple, rapid, and inexpensive method of making true copies that is frequently used in business.

Oftentimes the library publications are circulating. In that event the material may be taken to the office and copied there by typewriter. Even if copies are not circulating, the librarian will often permit the secretary to borrow them for a limited time, for libraries are eager to co-operate with business people and to have them make fullest use of their collections. In fact, public libraries all over the country are making concerted efforts to place on their shelves those publications which are of interest and value to the businessman.

REFERENCE READING

Coman, Edwin T., Jr. *Sources of Business Information.* New York: Prentice-Hall, Inc., 1949, 406 pp.

QUESTIONS ON READINGS

1. What sources of information on business subjects are likely to be found in your office?

2. Why do businesses of like interests, and persons engaged in similar occupations, band together in associations?

3. How are names of persons selected for listing in *Who's Who in America?*

4. What kinds of information are given in a city directory?

5. In what kind of directory would you expect to find (a) the name of your local physician; (b) the president of Harvard University; (c) the Speaker of the House of Representatives?

6. If your employer wanted to order a book by mail and knew the title of it but not the name and address of the publisher, or the price, how would you go about learning these facts for him?

7. Does the reference department of your public library render telephone service? If so, what limitations are placed on this service?

8. Why do library card catalogs use at least three cards for each book?

9. What kind of guide or index in the library would you consult to locate (a) a magazine article of current interest; (b) current magazine articles on a specific business topic; (c) the approximate date that your local paper would have carried a news account on a subject of world-wide interest?

10. Why does the secretary need two sizes of cards for research work at the library?

11. If a secretary's notes on one topic from one source take more space than that available on the front of a 6" x 4" card, should she use the back of the card or a second card?

12. What is the name of an agency that renders photostatic service in your community? What would be the cost of photostating a page of typewritten material?

DISCUSSION QUESTIONS

1. If your employer was engaged in atomic research and gave highly technical dictation, where would you turn for help in learning the spelling and meaning of new words?

2. The college-type dictionaries published by Random House and Webster differ in the arrangement of their contents. Examine the two dictionaries and explain the differences.

3. What would you do if the employer disagreed with the rules of good usage you followed in your transcription?

4. In keeping reference materials in your office, one of the most difficult decisions is that of determining how long the material should be retained. In each of the following cases, what factors would determine your decision:

(a) Catalogs from suppliers
(b) Back numbers of professional and technical magazines
(c) Advertisements of competitive items
(d) House organs of your company
(e) Copies of Statemen's Yearbooks
(f) Kiplinger Washington Letters

PROBLEMS

1. Compile a list of libraries in your city or in a nearby city if the community in which you live is quite small. For each library, list the following information:

(a) Name of library and its location
(b) Type of library
(c) Whether or not telephone service is rendered by the reference department
(d) Other information of value to a secretary

2. Assume that you are the secretary of a newly established office and that your employer has asked for your recommendations regarding reference books that are most urgently needed. You are to indicate the type of office for which you are working. Prepare your list of reference books, including for each its cost and a statement of your reason for selecting that book.

3. Compare the table of contents of *Webster's New International Dictionary* with that of *Webster's Collegiate Dictionary.*

CHAPTER 16

WORKING WITH STATISTICS AND GRAPHS

"ONE picture is worth a thousand words." Business executives are very much aware of this fact. If you will examine the annual reports furnished by many large companies to their stockholders, you will find that they are filled with illustrative tables and pictorial graphs that tell a story more vividly and convincingly than pages of words and figures.

The secretary who has the ability to take masses of unimaginative figures and organize them into tables and graphs that make direct declarative statements with dramatic and vivid simplicity is of exceptional value to her employer.

Giving life to figures, which is what well-planned tables and graphs really do, calls for a thorough knowledge of the techniques of table and graph construction, good planning, and some imagination. There are six steps involved in this type of work: (1) deciding precisely what the table or graph is to say, (2) examining sources of data, (3) compiling the data, (4) determining the method of arrangement that will best present the data, (5) planning the layout, and (6) typing the table or constructing the graph. These six steps will be discussed in this chapter.

DECIDING WHAT THE TABLE IS TO SAY Frequently, a table is confusing to the reader because the person preparing it did not have clearly in mind exactly what the table was to say. Before preparing a table or a graph, ask yourself this important question, "Precisely what is this table to show?" For example, if you were constructing a table of the commissions earned by each salesman of your firm during a certain month, you could do it in one of several ways: (1) list the names of the salesmen alphabetically; or (2) list them by territory, that is, geographically; or (3) array them, that is, list them in ascending or descending order according to the amounts of commissions earned. The arrangement selected would depend upon what

the table is to show. If it is to be used primarily for reference, the alphabetic form would be most satisfactory. If the table is to be used to compare sales of your product in various sections of the country, the geographic form should be used. If, however, you wanted to show how many of the salesmen were in the upper and the lower brackets according to sales volume, an array would be the most helpful. The first step, therefore, is to determine exactly what information the form will provide and how that information will be used.

SOURCES OF DATA Much of the statistical data with which you will work as a secretary will be obtained from records within your own organization. The more familiar you are with these records, the better prepared you will be to construct tables and charts depicting the operation of the business.

You may be asked also to compile tables and draw charts based on data published by governmental agencies, financial institutions, trade associations, periodicals, and statistical organizations. There are statistical reports on labor, production, income, health, population, finance, and commerce—to mention but a few of the general classes. Many of them are on file in public and special libraries.

A few of the many publications containing statistical data published by various bureaus of the United States Government are: *The Survey of Current Business, Statistical Abstract of the United States, Federal Reserve Bulletin, Wholesale Prices, Retail Prices, Commerce Yearbook, Statistics of Income, Financial Statistics of States and Cities, Monthly Labor Review, Census of Occupations, Census of Distribution,* and *Domestic Commerce.* The statistical office of the United Nations also publishes a *Monthly Bulletin of Statistics.*

Pertinent data are frequently published by financial institutions and trade associations; for instance, the *Chicago Board of Trade* furnishes daily information on receipts of wheat, corn, oats, and other commodities. Trade journals like the magazine *Oil, Paint* and *Drug Reporter* publish weekly price indexes of drugs, oil, and other products. Such periodicals as *Barron's, Business Week,* and the *Magazine of Wall Street* contain data on a wide variety of subjects.

Statistical service organizations such as *Standard and Poor's Corporation, Dun and Bradstreet,* and *Moody's Investor Service* publish weekly and monthly analyses and forecasts of business and financial conditions. Many universities have bureaus of business research that compile and analyze statistics.

COMPILING DATA

In statistics *compiling data* means collecting and listing or classifying the data in tabular form in order to arrive at totals, averages, or percentages to the end that the data can be summarized, studied, and interpreted. A simple kind of statistical compilation might deal with the number of replies to a "return-this-coupon" advertisement inserted in several magazines. The returns would be tallied by magazines to determine which one was the most productive.

To make a compilation of data is simply to prepare a pencil-written tabulation. Columnar sheets are used so that one set of factors can be listed along the top in column headings and another set along the side. Ruled paper, such as columnar work-sheet paper as used by accountants or squared paper statistically known as *co-ordinate paper,* is commonly used for compilations.

When making up a tabulation form, the secretary should be sure to provide space, if at all possible, for the final information desired. Notice that *total lines,* which give the information desired, are included in the compilation illustrated. A summary table can be typed from these total lines or a pencil copy can be drafted and the typing copied from it. In any event the typed table should be checked back to the total lines on the pencil compilation.

DETERMINING METHODS OF ARRANGEMENT

Statisticians classify tables into two kinds: general-purpose tables, those to be used for reference; and special-purpose tables, those that direct the eye and mind to specific relationships of significance. The very large comprehensive tables of census data are general-purpose tables. Most tables of statistical data that are included in business reports are special-purpose tables.

(2) A *kind grouping* of data is used when the items are kinds of objects, characteristics, products, and so on. An example of this method is a table entitled, "Retail Trade in U. S., 1950, by Detailed Kinds of Business." The numbers of stores and the year's sales are broken down into several main groups—food stores, apparel stores, etc., and under each of these are listed the data for each of the types of stores included in the group.

(3) *Size variations* may be shown in two ways; (a) in an *array*, that is, with the items listed in ascending or descending order, such as a table of the fifty greatest ports in the world with the ports arranged in the order of net tonnage in descending order; (b) in a *frequency distribution*, that is, according to the

UNITED SALES CORPORATION
DISTRIBUTION OF EMPLOYEES BY WEEKLY
EARNINGS FOR THE WEEK ENDING
NOVEMBER 25, 195-

Weekly Earnings	Totals	Percentage of Total Employees
$20.01 - $25.00*	2	1.7**
25.01 - 30.00	12	10.1
30.01 - 35.00	24	20.2
35.01 - 40.00	33	27.7
40.01 - 45.00	22	18.5
45.01 - 50.00	13	10.9
50.01 - 55.00	11	9.2
55.01 - 60.00	2	1.7
	119	100.0

*Employed part time only
**Expressed to the nearest one tenth of one per cent

FREQUENCY DISTRIBUTION

A frequency distribution of this type generally begins with the class of smallest numerical value. Note that vertical lines are used to separate columns and that the ends of the table are left open. The single and the double asterisk are the most commonly used symbols to identify footnotes.

number in each size class. It is used instead of an array when the size classes can be grouped advantageously. Tables of age distribution are usually shown in this way, reporting the number of persons between the ages of 10 to 14, 15 to 19, etc., instead of the number of persons 10 years old, 11 years old, and so on.

(4) A *location listing* is a listing showing the data by geographic units—cities, states, countries, etc. Real-estate data are often listed this way, as are commodity sales on a national scale.

(5) *Time-of-occurrence, or time-series, listings* are very common. The listing may be made by days, weeks, months, years, decades, etc.

PLANNING THE TABLE LAYOUT It is almost impossible to type a well-balanced table, allowing sufficient space for all items and margins, unless the work is carefully planned. The facts and the figures to be tabulated must be analyzed carefully before the various headings and column arrangements are determined. The best method of planning a table is to rough out the entire pattern in pencil.

In planning the column spread, remember that for words and phrases in tabulated form, the left margin should be kept straight and that for tabulated figures, the right margin must usually be kept straight. When decimal fractions involving different numbers of places to the right of the decimal point are listed, the decimal points must be kept in vertical alignment.

To allot adequate space for each column in the table, pick out the longest line in each column and count the number of spaces needed for that line. Then, add the number of spaces required by all columns and subtract this total from the number of spaces in the width of the page to determine the number of spaces available for margins and for spacing between columns. For example, if the total of the spaces required by all columns is 43 and a typewriter with elite type is being used, 43 spaces should be subtracted from 100 spaces, which is the approximate number of spaces in the width of an 8½ by 11-inch sheet of paper. The difference, 57 spaces, is available for column separations and margins. If 4 columns are involved and 7

spaces are allowed between the pairs of columns, 21 spaces will be used in this manner, leaving 36 spaces for the two margins, or 18 for each. The table makes a better appearance if the side margins are somewhat wider than the spaces between the columns. If the pages of the report are to be bound on the left side, the left margin, of course, should be wider than the right margin.

If other copy is to appear on the same page with the table, there is no problem in the vertical placement of the table, that is, in determining top and bottom margins. If the table appears on a page by itself, however, the number of lines required by the table must be determined and subtracted from the number of lines available on the page. For example, if the entire table, including the title, column headings, and lines of data, requires 43 lines, the top and bottom margins on an 11-inch page will total 23 lines, the difference between 66 and 43. In order to secure a bottom margin that is slightly wider than the top margin, the available space may be divided either 11 spaces for the top margin and 12 spaces for the bottom margin, or 10 spaces for the former and 13 for the latter.

The next step is to set the left margin stop and tabulator stops according to the calculations made for the horizontal placement of the columns. As a double check on the calculations, it is advisable to type a proof sheet of the table, which need not include all of the information but only so much of it as is necessary to test the setup of headings and column widths. Careful planning of the layout of a table makes it possible for the secretary to concentrate on accurate, neat typing of the final draft.

SUGGESTIONS FOR TYPING TABLES The following additional suggestions may simplify the secretary's work of typing statistical tables of various kinds.

1. The title should be clearly worded so that it states briefly what data are shown in the table. It should be centered above the table, and, if necessary, divided into two or three lines in an inverted pyramid arrangement. It is usually typed in all capitals.

2. As far as possible, headings should be centered in their respective columns. In order to save space, abbreviations may

Some flexibility is obtained by using two typewriters, one with pica type and another with elite type. Footnotes and column headings may be typed on an elite-type machine, while entries in the body may be typed on a pica-type machine. A wide-carriage typewriter may be used for tables containing a number of columns.

UNITED SALES CORPORATION
NUMBER OF ACCOUNTS AND TOTAL SALES
IN 12 SELECTED CITIES IN IOWA
1948-1949

City	No. of Accounts	Total Sales 1948	Total Sales 1949
Ames	6	$ 246.96	$ 273.08
Cedar Falls.	3	140.60	177.21
Council Bluffs . . .	2	98.25	110.84
Davenport.	5	275.18	301.62
Des Moines	12	826.34	927.00
Dubuque.	1	46.18	32.20
Jefferson.	3	125.84	87.64
Fort Dodge	4	375.80	416.20
Iowa City.	3	521.10	496.32
Mason City	1	118.24	177.18
Ottumwa.	6	467.25	519.34
Shenandoah	2	217.10	386.19
Total	48	$3,458.84	$3,904.82

LOCATION LISTING

This was prepared from the work-sheet compilation on page 314. Note how leaders and skipped lines are used to improve the readability of the table.

CHECKING THE TYPED TABLE Every typewritten table must be checked for accuracy. This proofing requires the help of another person, who should read the original draft while the secretary checks the typed copy. Reading figures for check purposes is an oral technique that has a fairly definite prescribed routine, which is indicated by the examples on page 320. The words in the examples that are connected by a hyphen should be read as a group; the commas indicate pauses.

718	Read seven-one-eight
98,302	Read nine-eight, three-0 (oh)-two
24.76	Read two-four, point, seven-six
$313.00	Read three-one-three even (or no cents) dollars
77,000	Read seventy-seven thousand even

For copy in columnar form it is usually advisable to read down a column rather than across the page. This provides a double check because, in most instances, the typing work has been done across the page. If the table includes totals, the amounts in each column should be added and checked against the total. Any typing error made in that column of figures will be revealed by this type of check.

After the accuracy of the typed table has been checked and errors that are located are corrected, the original draft of the table should be filed in a personal folder kept by the secretary or attached to, and filed with, the typed file copy of the final draft. If anyone who reads the typed copy discovers an error, the filed copy of the original data will enable the secretary to determine whether the error occurred in the original material, which may have been supplied to the secretary, or whether the error was made in the process of typing the table.

AVERAGES

An average is a single value used to represent a group. The commonly used average is the *arithmetic average* or, more technically, *arithmetic mean.* It is determined by adding the values of the items and dividing that total by the number of items. If the weekly payroll for 119 employees is $5,831, for example, the average pay check would be $49.

The *mode* is a second kind of average. It is the value that recurs the greatest number of times. In order to determine the mode, the data must be arranged in a frequency distribution. In the illustration on page 315, the mode is the class interval, $35.01 to $40.00, because the greatest number of employees earned amounts that are included in that range.

The *median* is an average of position; it is the midpoint in an array. In order to determine it, the data must be arranged in an array, that is, in either ascending or descending order. Then it is only necessary to count the number of items and find the mid one, which is the median. For example, assume that

five students had the following amounts in their checking accounts: Student A, \$160; B, \$135; C, \$220; D, \$190; and E, \$175. To find the median, arrange the amounts in an array as follows:

\$220
190
175
160
135

The amount at midpoint, the third item, is \$175; therefore the median is \$175.

If there are twenty-one items in an array, the eleventh one would be the midpoint and would give the median value. If there were twenty items, the median would be equidistant between the tenth and the eleventh point; for example, if the tenth point had a value of \$200 and the eleventh \$220, the median would be \$210.

PERCENTAGES Sometimes percentage figures furnish simpler comparisons than mere quantities or totals. In the illustration of the frequency distribution on page 315, the last column shows the percentage of total employees earning salaries within each frequency class. The statement, "Twenty per cent of our employees earn between \$30 and \$35," is more easily grasped than, "Twenty-four of our 119 employees earn between \$30 and \$35."

Percentage relatives or *index numbers* are used to compare the extent or degree of changes. They are relative because they are based on a value at some specific time. For example, in 1929 there were approximately 20,000,000 telephones in the United States; in 1934, 17,000,000 telephones; in 1940, 22,000,000; and in 1948, 30,000,000. The percentage relatives, based on the 1929 figure as 100, are 85 for 1934, 110 for 1940, and 150 for 1948. The base on which percentage relatives are calculated must be clearly defined.

MECHANICAL AIDS The adding and subtracting of statistical data may be performed rapidly on an adding machine. The adding-machine tape, after it has been checked and the total has been recorded, should be folded, identified, and securely fastened to the file copy of the tabulation.

punched cards are fed into machines that automatically sort and tabulate them. Some movie-casting agencies "type" their applicants on such cards and electrically sort all the cards on file for the ones who will fill specific requirements. Business concerns use them for sales analyses, inventory analyses, and personnel records. Trained persons are required to operate these machines; but if the secretary is a member of a company utilizing such equipment, it will be interesting and to her advantage to understand in what ways these machines may be used.

To make service available to small firms whose volume of work would not require the full-time use of sorting and tabulating equipment, the International Business Machines Corporation provides a service bureau in the larger cities. Cards are generally punched in the office of the firm and then sent to the service bureau for sorting and tabulating.

GRAPHIC PRESENTATION

A graph is a statistical picture. It presents numerical data in visual form, making them more easily analyzed and remembered. The average person can remember a graph, yet he is unable to remember the columns of figures upon which the graph is based. Taking the hard facts of business and organizing them in visual form to make comparisons easy, to emphasize contrasts, and to bring out the full force of the message the figures can tell, is a challenging opportunity for the secretary. To do this successfully, she must have a basic knowledge of the various types of graphs, how they are constructed, and their suitability for particular types of data.

Line Graphs. The most commonly used type of graph is the line graph. It is most effective in showing fluctuations in a value or a quantity over a period of time, such as variations in production, sales, costs, or in profits over a period of months or years. Thus, the line graph is an effective way to depict a comparison of trends over a period of time.

The line graph illustrated on page 326 points out the trend in sales and cost of goods sold over a five-year period. It shows that the margin between sales and cost of goods sold is smaller at the end of 1949 than at any other time during the five years covered by the graph.

Bar Graphs. The bar graph presents quantities by means of extended bars. Variations in quantity are indicated by the lengths of the bars, which may be drawn horizontally or vertically. The vertical bar chart is generally used when an element of time is involved.

The bar graph is most effectively used to show comparisons of a limited number of values, generally not more than four or five. The vertical bar graph illustrated on page 327 compares the total sales of four departments during 1949, while the horizontal bar graph compares production figures on five items in the two years 1948 and 1949.

Circle Charts. The circle chart is an effective way to show the manner in which a given quantity is divided into parts. In this type of graph the complete area of the circle represents the whole quantity, while the divisions within the circle represent the parts. Thus, it shows not only the relationship of each part to the whole, but also of each part to every other part.

The circle chart may be used to present such data as how the sales dollar is spent; how taxes paid by a firm are divided between local, state, and federal governments; the percentage of store purchases made by men as compared with the percentage of store purchases made by women; or distribution of total costs among raw materials and each manufacturing operation.

Pictorial Charts. One of the newer and more interesting developments in graphic representation is the use of pictorial charts. They are generally an adaptation of one of the other types of graphs in which drawn symbols are used to represent the types of data being charted.

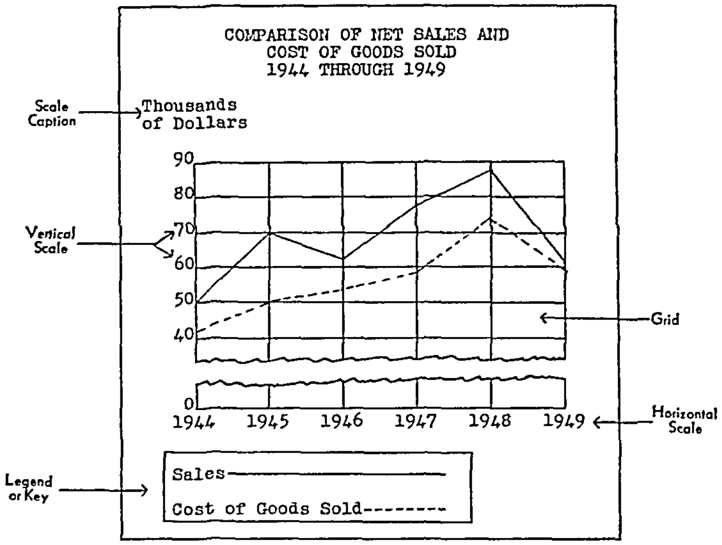
For example, a bar chart showing fire losses may be illustrated with streaming fire hose, the length of the stream varying with the amount of the loss. The growth of telephone service may be represented by cradle telephones arranged in a line, each telephone representing so many thousand telephones. It is not considered good practice to represent increases by increasing the size of the object symbolized, such as increasing the size of the telephone to indicate an increased number. The reason for this is that it is difficult to compare like objects of different sizes. It is easy to determine that one is larger than

the other, but to estimate that one is twice or three times as large is difficult. Furthermore, it frequently gives the impression that the item and not the quantity increased in size. Symbols can be laid out in bars, plotted on maps, or put in pie segments. Sometimes the symbol is used in different sizes to indicate different quantities or values; at other times the symbol represents a unit of measurement and is repeated the number of times necessary to indicate a certain quantity or value. Visual comparison, however, is simpler and more accurate with the repeated symbol than with the proportionately sized symbol. Usually the amounts represented by the symbols are included in pictorial charts.

Preparing Charts. In making any chart, no matter how simple, it is best to rough out a working copy first. When the final copy is prepared, it should be framed on the paper, allowing even margins on the sides, unless the pages are to be bound on the left side, and a bottom margin that is slightly larger than the top margin. If the necessary guide points are marked lightly in pencil, they may be erased with art gum after the inking in is completed. India ink should be used for permanent clear work. Ink-ruled lines are best made with a draftsman's ruling pen. A drop of ink is placed between the blades of this type of pen and the blades adjusted to the width of line desired. If the ruling is done with a regular pen, a metal-edge ruler should be used to avoid blots, and the pen point should be kept at right angles with the edge of the ruler as the line is drawn.

When unruled paper is used, lines that are parallel to the edges of the paper can be drawn by using a right-angle triangle. A rectangular piece of cardboard, such as the stiff cover of a shorthand notebook, serves as a satisfactory substitute. The edge of the cardboard should be placed exactly over the edge of the paper and the line drawn at right angles to that edge.

The title of the graph should indicate its nature concisely. It should be centered above the chart and its lettering should be the largest or the most heavily emphasized on the chart. The use of lettering guides is recommended. The source of the data and the date of compilation can be placed in one of the bottom corners. This information may be omitted from the presentation copy, but it is especially important that it be recorded on the working copy.



LINE GRAPH WITH EXPLANATORY TERMS

Note how a break in the chart is used to conserve space and avoid placing the plotted data too high upon the grid. Although only two items are plotted on this chart, as many as four or five may be plotted provided the lines are not too close together.

Suggestions for Preparing Line Graphs.

1. Prepare a working copy on printed graph or co-ordinate paper; and the final or presentation copy, on plain paper.

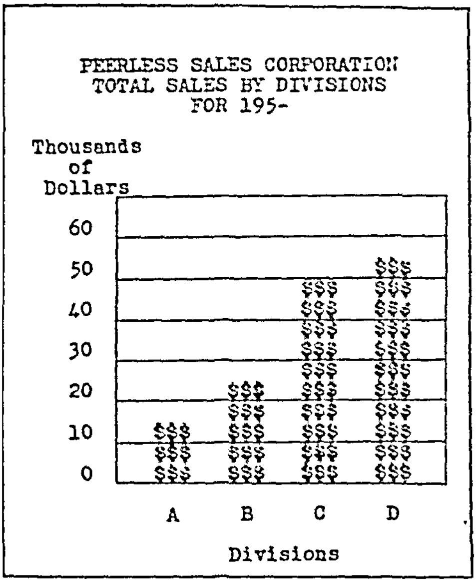
2. Place periods of time on the horizontal scale at the bottom of the graph; record variations in quantities or numbers on the vertical scale.

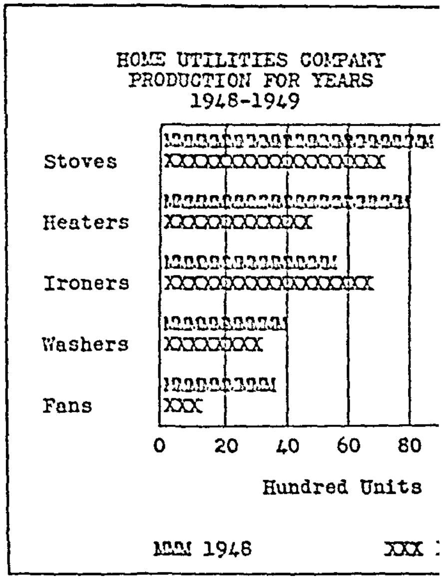
3. Always show the zero quantity. To avoid placing the curve too high on the chart, a break in the chart may be made to show that part of it has been omitted.

4. Avoid distortions by planning the size of your graph. It is good practice to make the width at least one and one half and not more than one and three fourths times the height.

5. If possible, place all letters horizontally on the chart.

6. If more than one line is used, make each one distinctive in character. Solid line ——— Dash line ----- Dotted line . . . Dot and dash line . — . — . — .





VERTICAL AND HORIZONTAL BAR GRAPHS

These show the relationship between quantities. These types of graphs may be prepared on the typewriter.

Suggestions for Preparing Bar Graphs.

1. The chart should be divided into horizontal and vertical units that are convenient both in preparing the graph and in interpreting it.

2. For best appearance, the bars should be spaced so that there is a distance between them ranging from one half to a whole width of a bar.

3. Except for time series, the quantities indicated on the chart should begin with 0 (zero). In a chart where starting at zero makes the chart too tall or too wide, omit that portion after zero on which all bars would appear and indicate the omitted portion by a pair of break lines.

4. Descriptive captions should be centered above the vertical scale and under the horizontal scale.

5. When possible, arrange the bars in ascending or descending order. If arranged according to time, the earliest period should be first.

6. The bars may be in outline form or solid. If the bars represent different items, they can be shaded or colored to differentiate them.

7. The bars may be made on the typewriter by using upper-case letters, such as "X's," "W's," "N's"; the dollar sign; or a heavy strikeover, such as "X" over "O."

Suggestions for Preparing Circle Graphs.

1. Convert the data to be presented into percentage form. Let the circumference of the circle equal 100%.

2. Arrange the elements to be plotted according to size, largest first.

3. Mark the top center of the circle. From this center point on the circumference, mark off that percentage of the total which each segment represents, moving clockwise around the circle and starting with the largest segment.

4. To determine the size of each segment:

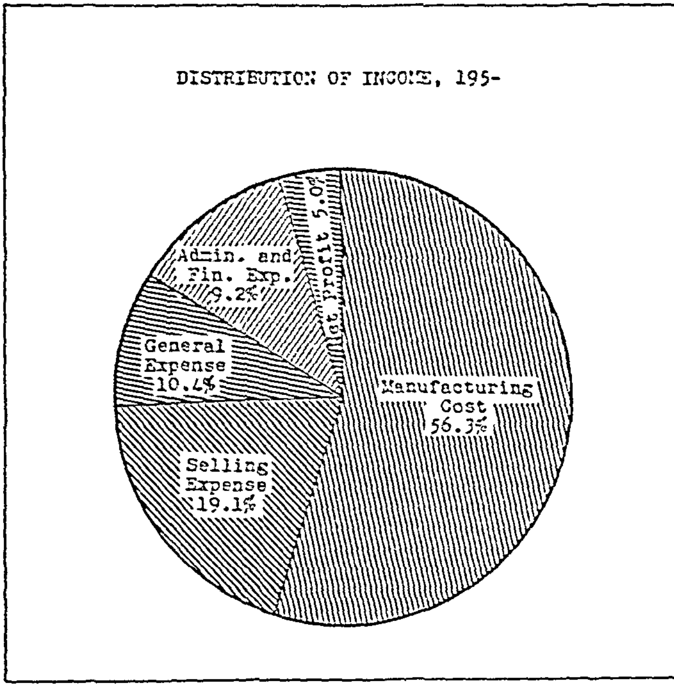
   (a) *If using a protractor.* The circumference of the circle equals 360 degrees, or a total of 100%. One per cent would equal 3.6 degrees; thus a segment representing 10% would be 36 degrees.

   (b) *If a protractor is not available.* Divide the circumference of the circle into four equal parts, each part representing 25%. Each fourth part may in turn be divided into halves, which would represent 12½% segments. Follow this division plan until the size of segment desired is obtained.

5. If space permits, identify each segment by a caption inside the segment. Shade or color the segments to provide contrast.

6. Write the titles of the sections horizontally.

Limitations. While graphs are useful in presenting comparative data, they have certain limitations. The number of facts presented on any one graph is usually limited to four or five. It is best to use a table when six or more items are involved. A second limitation is that only approximate values can be shown. Thus, graphs are useful as a picture of the general situation, but they cannot be used when specific



CIRCLE GRAPH

This shows how the income of a firm was divided among the various cost, expense, and profit items. It shows clearly the relationship of each item to every other item and to the total income.

amounts and details are needed. For this reason it is quite common to provide tables to accompany graphs. These tables are for reference purposes for readers who wish more details than the graphs can provide.

A third limitation is that it is possible for a graph to be drawn with mathematical accuracy and still give a distorted picture of the facts being presented. For example, the overall width of a line graph determines the angles of the plotted lines. A graph that is too narrow may indicate a much sharper rise and fall in the lines than the data indicate. In the same way, a graph that is too wide may tend to give the impression of a much more gradual fluctuation and change than may have actually occurred.

REFERENCE READINGS

ARKIN, HERBERT, and COLTON, RAYMOND R. *Graphs: How To Make And Use Them.* New York: Harper and Brothers, 1936, 224 pp.

CROXTON, FREDERICK, and COWDEN, DUDLEY J. *Applied General Statistics.* New York: Prentice-Hall, Inc., 1942, pp. 49–99.

MODLEY, RUDOLF. *How to Use Pictorial Statistics.* New York: Harper and Brothers, 1937, 170 pp.

WANOUS, S. J., and ERICKSON, L. W. *The Secretary's Book.* New York: The Ronald Press Company, 1948, pp. 305–315.

QUESTIONS ON READINGS

1. Describe each of the following ways of presenting data in tables. For what type of statistical presentation is each especially adapted?

(a) Alphabetic
(b) Kind
(c) Size
(d) Location
(e) Time of occurrence

2. If certain data are recorded on a monthly basis, when should monthly cumulative totals be shown rather than an annual total only?

3. In what way might a statistical table combine a location listing and an alphabetic sequence of data?

4. What kinds of statistical information are provided in each of the following publications:

(a) *Monthly Bulletin of Statistics*
(b) *Business Week*
(c) *Statistical Abstracts of the United States*
(d) *Federal Reserve Bulletin*
(e) *Foreign Commerce Yearbook*

5. In the example on page 316 for planning the layout of a table, at what points would you set your marginal stops if pica type is used, assuming that the pages are to be bound at the top?

6. How do numbered columns in a table save time?

7. How are explanatory footnotes inserted in a table?

8. In proofreading, how should one read the following:

(a) 49
(b) 1,005
(c) 316.024
(d) $5,500
(e) 7½

9. When do you think that the mode is a better measure of central tendency than the median?

10. If production in the first year was 10,000 units and in the second year 15,000 units, what would be the percentage relative of the second year's production based on that of the first year? What would be the percentage relative of the first year's production based on that of the second year?

11. What kind of graph would you use to represent each of the following:

(a) The distribution of the company's income for a year
(b) The comparative sales of seven territories for one year
(c) The comparative productions of three manufacturing branches over a period of five years
(d) A comparison of the ways in which the consumer's dollar was spent in each of three years in a certain city

12. If you were preparing a horizontal bar graph on 8½ by 11-inch paper and the largest quantity involved was $69,218, what horizontal scale would you use?

13. In a circular graph how many degrees would be included in a segment that should represent 12½ cents out of a dollar?

DISCUSSION QUESTIONS

1. Under what circumstances might it be necessary for the secretary to prepare two or more tables, using different arrangements of the same data?

2. There is a tendency among corporations having a large number of stockholders to present the activities of the company to its stockholders in graphic form in place of statistical tables. However, statistical tables are still used in reporting to boards of directors, to banks, and to state and federal controlling agencies. What is your explanation of the reason for using these two methods of reporting?

3. It is sometimes said that you can prove anything by statistics. Can you present illustrations from your readings of how graphic presentation might distort the facts?

4. What is the secretary's responsibility in a situation in which she is fully aware that her employer is issuing false statistical information? Would it make any difference whether the information was going to an outside agency or to another official in the firm? What should she do if the information was misleading but not illegal?

5. How could the punch card system be used by a refrigerator manufacturing company in gathering and classifying data on sales?

PROBLEMS

1. As secretary to a doctor you have been requested to prepare a tabulation of the food values of the following fresh fruits:

Pineapples, 85.3% water, .4% protein, .2% fat, 11.9% sugar; 260 calories per pound. (contain citric acid)

Apples, 84.1% water, .3% protein, .4% fat, 11.1% sugar; 290 calories per pound.

Strawberries, 90.0% water, .8% protein, .6% fat, 5.3% sugar; 185 calories per pound. (contain citric acid)

Grapes, 81.9% water, 1.4% protein, 1.4% fat, 11.5% sugar; 355 calories per pound.

Peaches, 86.9% water, .5% protein, .1% fat, 8.78% sugar; 230 calories per pound.

Nectarines, 82.9% water, .5% protein, .1% fat, 11.8% sugar; 305 calories per pound.

Apricots, 85.4% water, 1.0% protein, .1% fat, 10.4% sugar; 255 calories per pound.

Oranges, 87.2% water, .9% protein, .2% fat, 8.8% sugar; 230 calories per pound. (contain citric acid)

Bananas, 74.8% water, 1.2% protein, .2% fat, 19.2% sugar; 445 calories per pound.

Grapefruit, 88.8% water, .5% protein, .2% fat, 6.5% sugar; 200 calories per pound. (contain citric acid)

(a) Prepare a pencil copy of an alphabetic tabulation of these data. Indicate in some manner those fruits that contain citric acid.

(b) Type the table in good form; make two carbon copies. If necessary, prepare a layout for the table in pencil.

(c) Type one copy of an array showing the fruit in the order of the percentage of sugar.

(d) Type one copy of an array showing the fruit in the order of calories per pound.

2. Your employer wants a report of the 1930 and 1940 populations of the following cities:

Ashland, Ky.	Ft. Wayne, Ind.	Memphis, Tenn.
Birmingham, Ala.	Gadsden, Ala.	Peoria, Ill.
Canton, Ohio	Gary, Ind.	Phenix City, Ala.
Cape Girardeau, Mo.	Granite City, Ill.	Pontiac, Mich.
Chattanooga, Tenn.	Hammond, Ind.	Saginaw, Mich.
Columbia, Mo.	Johnson City, Tenn.	South Bend, Ind.
Dayton, Ohio	Kansas City, Mo.	Tuscaloosa, Ala.
Decatur, Ala.	Knoxville, Tenn.	Wyandotte, Mich.
	Louisville, Ky.	

(a) Prepare in pencil a tabulation of the data that you secure from a reference book for this report. Group the cities by states. List the states, and cities in each state, alphabetically.

(b) Type the table in good form making one carbon copy. If necessary, prepare a pencil layout.

(c) Keep a record of the time you spend on this project and prepare an itemized report of the cost of preparing this table for your employer. Assume that your salary is $50 for a forty-hour week.

3. The following grades were made on a written examination by eighty college graduates seeking employment with a large insurance company:

75	77	82	78	56	34	73	68
69	82	48	31	92	82	73	78
90	73	75	70	82	91	70	74
89	88	65	95	85	96	60	99
57	60	40	84	86	65	85	67
76	73	87	78	77	90	80	95
75	75	79	95	62	70	90	70
90	38	75	80	69	83	85	100
50	52	86	48	70	85	55	85
62	76	84	77	77	79	81	75

(a) Prepare in pencil a frequency distribution of the grades. Use a class interval of five, such as 51 to 55, 56 to 60, and so forth. The tabulation should include the percentage of applicants who earn grades in each frequency class.

(b) Determine the modal class interval.

4. The following amounts are the August sales of a product.

Invoice	Amount	Invoice	Amount	Invoice	Amount
2311	$118.23	2319	$ 16.94	2327	$ 83.17
2312	41.32	2320	78.26	2328	67.92
2313	91.73	2321	124.36	2329	74.26
2314	63.24	2322	97.08	2330	68.31
2315	36.74	2323	9.61	2331	17.08
2316	18.92	2324	18.23	2332	10.66
2317	87.65	2325	107.16	2333	94.33
2318	27.11	2326	26.31	2334	101.09
				2335	89.31

(a) Prepare in pencil a tabulation of the sales so that you can determine the median. What is the median sale for August?

(b) Calculate the arithmetic average or mean of the August sales.

PROJECTS

A. **Preparing Graphs.** The following figures represent the sales volume for Continental Products for each month for the period of 1948–1949.

	1948	1949
January	$86,857	$114,273
February	69,623	92,526
March	38,972	64,159
April	34,284	60,844
May	40,485	69,273
June	37,737	76,294
July	40,852	74,858
August	46,085	82,437
September	49,592	80,158
October	55,846	83,628
November	54,249	87,859
December	61,292	94,958

Your employer, Mr. Simpson, wishes you to prepare for a board of directors' meeting:

(1) A bar graph of the data for 1949.

(2) A curve or line graph of the data for the two years.

B. **Circle and Bar Graphs.** The following data show how the sales dollar was distributed for your firm in 1948 and 1949.

	1948	1949
Labor	44.8¢	45.0¢
Material and supplies	17.4¢	16.3¢
Other costs	21.3¢	24.2¢
Net operating income	16.5¢	14.5¢

Your employer asks you to present these data in graphic form.

(1) Prepare a circle graph showing how the sales dollar was distributed in 1949.

(2) Prepare a bar graph that will compare the 1949 figures on each item with the 1948 figures.

CHAPTER 17

DEVELOPING BUSINESS REPORTS

BEFORE business developed into the complex, giant organization that characterizes it today, management could keep up with all developments by strolling through the plant and talking with the few employees. Today, however, with the extreme departmentalization now prevalent, management in business, in government, and in the professions would be lost without frequent written progress reports to interpret the numerous activities. Department heads and specially employed experts provide the records and reports upon which company policy and decision are ultimately based.

Recently business has recognized the need for improvement of business reports. In the colleges and universities courses in business report writing have been added to curricula in schools of business administration and in technical schools such as engineering colleges. There are certain techniques that can be used to improve the business report and make it intelligible to the reader, techniques that require special study and practice.

Your employer will undoubtedly write—and rewrite—numerous business reports for internal use and perhaps for outside consumption. As his secretary, you will want to acquire a facility in using the various devices that will make his ideas stand out clearly.

TYPES OF REPORTS Broadly speaking, there are three types of reports. The first type, written by the professional expert, is technical in approach and substance. The comprehensive financial statement prepared by the certified public accountant for a specialized audience (loaning banks, revenue agents, and top management) is an example of this kind of report. It follows a prescribed form and utilizes a specialized vocabulary.

The capital for today's corporations is supplied by stockholders scattered over the entire globe. When they see the

technical statement at the end of the year, they cannot understand what has happened to their money. The report of the professional accountant is neither interesting nor clear to the untrained reader, and the executive and his secretary may be asked to write the second type of report, a digest of the technical report in the popular, easy-to-understand language of the average shareholder. The contents may be dramatized by illustrations and charts. Much attention is being given to methods of simplifying and streamlining the technical report for popular consumption.

The third kind of report, and by far the most frequently encountered by the secretary, is that of the departmental executive to his superior to inform him of monthly progress in his department, to discuss a recommended change in policy based upon an analysis of office data, or to advance a new idea.

GUIDING PRINCIPLES IN REPORT WRITING There is no one formula for writing business reports, but the secretary who remembers the following general principles by Gaum, Graves, and Hoffman[1] can be of real help to her employer.

(*1*) *Develop your report so that it may be read rapidly.* Clear typing; simple statements; elimination of vague or meaningless expressions; inclusion of tables of contents; use of clear subtitles for all sections, and of summaries in prominent places (especially at the beginning), and of topic sentences at the beginning of each paragraph—these are some of the devices that aid in making a report easy to read rapidly.

(*2*) *Develop your report to answer all your reader's questions.* Your job is not to put down all you know, but only all that your reader wants to know.

(*3*) *Develop your report with an objective tone.* Ordinarily, keep out of the report signs of your own personal feeling and your own personal achievements. In most reports avoid "I" and "my."

(*4*) *Develop your report with restraint.* Use the language of the "scientific" thinker. Avoid all exaggerations. Use few

[1]Carl G. Gaum, Harold F. Graves, and Lyne Hoffman, *Report Writing*, Revised Edition (New York: Prentice-Hall, Inc., 1942), pp. 9-10.

superlatives such as "very," "exceedingly," "absolutely," "ideal." Guard your undemonstrated conclusions and recommendations with such expressions as, "It seems probable," or "So far as can be foreseen," or "Results of this study indicate . . . ." Do not say "facts prove" unless they do actually prove beyond every reasonable doubt. Prefer to understate your conclusions rather than to overstate them.

(5) *Develop your report with text interpretations and conclusions.* Do not expect your reader to see the exact significance of the bare facts as they are presented in tables and charts. Interpret your data, tell what they mean, and explain the findings. At least some text discussion is necessary in almost every report (though many report writers violate this rule).

(6) *Develop your report to be appealing in appearance.* Make it pleasing to the eye, attractive in make-up—a credit to you and a reflection of your good taste—and at the same time you will make it easier to read.

(7) *Develop your report so that it can be read with comprehension in the future as well as today.* Reports are useful in determining immediate policies, but they should also be useful for later reference. Hence make all statements so complete and exact that the report will be useful to an executive or investigator who picks it up years later.

Points 1 (making the report readable) and 6 (making the report attractive) are the special responsibility of the secretary, and she should constantly study reports that are passing over her desk in an effort to pick up ideas on how to improve readability and attractiveness. However, attention to the other five principles will aid her to assist her employer as he performs this most challenging duty, writing effective reports.

PARTS OF A BUSINESS REPORT

There are informal business reports, which may be incorporated into a letter, and there are formal reports, which follow a more or less standard general outline as shown at the top of page 338. The simplest short report will not follow the complete outline. Several parts may be omitted, such as the cover page, the table of contents, and the bibliography.

Preliminary section:	Cover or title page Letter of authorization (optional) Letter of transmittal Table of contents List of illustrations, tables, charts
Body or text:	Summary and recommendations Development of subject matter Conclusions
Reference section:	Appendix Bibliography Index

OUTLINE OF THE PARTS OF A BUSINESS REPORT

The logical arrangement of a report would require that the summary and recommendations follow the analysis of data and grow out of the development of the subject matter. Businessmen are interested first, though, in the findings. They want to see *the conclusions and recommendations first; then they may* wish to read the body of the report to see how the author arrived at the conclusions and whether they agree with the conclusions. They are better prepared to read the body critically if they have glimpsed the over-all picture. Most books and articles on report writing suggest that the summary precede the text, and more and more reports are appearing in this form. Should your employer wish to follow the older form, you will naturally adopt it without discussion; but if there is an opportunity, type the report both in his form and the newer one and let him make his selection. Or if you have the opportunity, comment favorably on well-presented reports that you receive.

In almost every case, the body of the report is developed first and is typewritten in final form; after it is completed, the other parts are added. For that reason the specific parts will be discussed in the order of their preparation rather than in the order of their appearance in the report itself.

BODY OF THE REPORT The employer is concerned mainly with the body of the report. This he will give his careful and repeated attention. The inclusion of the other parts, and their forms, he will in most cases leave to the

secretary. What is said in the following paragraphs about the body of a business report also applies to papers that he may prepare for formal speeches and to articles that he may submit to business magazines for publication.

The Outline. Some men, the methodical ones, first set up a topic outline or framework of the report to be written. If the outline is not to become a part of the final report, the employer frequently elects to use a pencil draft rather than a typewritten one. In some cases, however, an outline is submitted for approval prior to the writing of the report itself. The secretary, therefore, must be able to make an outline and type it in proper form.

A good outline, of course, greatly simplifies the work and lessens the time required to write a report, but it also takes time to develop. An outline is a classified list of the topics to be discussed. The main topics may be called "headings" and each one may have subheadings, each of which in turn may have other subheadings, and so on. The correct placement of each heading and each subheading of the same degree requires concentration in the typing of a topic outline.

In outlining, the secretary should be sure that all similar ideas are expressed in parallel form; that is, in a series of nouns, phrases, or clauses even though the employer dictates them in a hit-or-miss construction.

Ungrammatical:	Reasons for Decreased Sales in November: 1. The public has spent its war savings. 2. Increased buyer resistance. 3. Unseasonably warm weather
Parallel Construction:	Reasons for Decreased Sales in November: 1. Disappearance of the cushion of war savings 2. Increased buyer resistance. 3. Unseasonably warm weather.
Parallel Construction:	Reasons for Decreased Sales in November: 1. The public has spent its war savings. 2. Buyer resistance has increased. 3. The weather has been unseasonably warm.

Roman numerals are aligned on the right side rather than on the left. Thus, in an outline the periods following the Roman numerals would be in vertical alignment.

I.
II.
III.
IV.

Many authorities are beginning to accept the omission of the period after the numeral in an outline or enumeration.

Editing the Outline. The secretary should edit the first draft of the outline carefully. She should make sure that there is no single topic division. For every "A" there should also be at least a "B." For every "1" there should be a "2," and so on. The reason for this is that if the topic has only one subheading, then that point is or should be made by the topic itself. In other words, a topic is not divided unless it has two or more divisions.

The words "Introduction," "Body," and "Conclusion" are generally not incorporated in the outline. It is usually possible to indicate the nature of such parts by the phrasing of the topic headings. Topics and subheadings are frequently expressed in specific and precise noun phrases. All excess words should be eliminated by the secretary (with the approval of the employer) to achieve the simplest outline possible.

Rough Drafts. In the writing of a business report, one or more preliminary rough drafts are usually worked over until a final one is satisfactory. These drafts serve to get the writer's thoughts on paper and to give him something tangible to work from to improve and revise. The first draft will probably be dictated. The transcription of this draft differs somewhat from the transcription of correspondence. Carbon copies are not made unless expressly requested or unless the secretary is in the habit of cutting pages of rough-draft copy into strips for rearrangement of paragraphs or topics.

The paper used for rough drafts is usually less expensive than letterhead quality but is sufficiently strong to withstand a good deal of erasing. Many offices use colored stock so that early drafts are recognizable among other sheets on the desk.

strips can be stapled, pinned, or pasted together to make up the new pages of the next draft.

Final Copy of the Report. The final draft of a business report is typed on paper of good quality with meticulous care so that it is accurate in content and consistent and attractive in form. Absolute accuracy in spelling and punctuation is mandatory. A dictionary must be kept within reach throughout the typing in order to check the spelling and the hyphenation of every doubtful word. The secretary should not depend on the employer for a check on punctuation. Some dictionaries contain brief summaries of punctuation rules, as do secretarial handbooks. Verify the punctuation; do not resort to guesses or hopes.

Before starting to type the first page, select the margins you intend to use; determine paragraph indentions; choose between double and single spacing. If the report is to be duplicated, see that the typed area on the page will conform to the space available in that method of reproduction. Margins should be set according to the type and position of binding. Reports to be stapled on the left side should have wider left margins. Those to be bound at the top should have deeper top margins. Those to be stapled in the upper left corner may have the same margin on each side. Margins on all four sides should be at least one inch.

The Title. The title usually should be centered and spread out rather than cramped into a short, stubby line. The examples shown illustrate this point. The line can be spread by spaces within words, or extra spaces between words. Underscoring helps to tie the letters into words when spaces are used between letters.

<u>A</u> <u>G E N E R O U S L Y</u> <u>S P A C E D</u> <u>T I T L E</u>

<u>A</u> <u>GENEROUSLY</u> <u>SPACED</u> <u>TITLE</u> <u>LINE</u>

<u>A</u> <u>COMPACT</u> <u>TITLE</u> <u>LINE</u>

A long title requiring more than one line of typing should be divided so that it can be read easily. Printers arrange such

Form A

T I T L E O F R E P O R T

Auxiliary Title Lines
If Necessary

MAIN HEADING

xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

FIRST SUBHEADING TITLE

xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

Second Subheading Title. xxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

Form B

C H A P T E R T I T L E

MAJOR TOPIC TITLE xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

FIRST SUBHEADING. xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

Second Subheading. xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
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TWO TYPES OF HEADINGS

Illustrated are only two types of headings that may be used to aid the reader in locating the divisions of the body of the report. The illustrations indicate how typewriting is used as a tool of expression, for a carefully organized arrangement aids the author in presenting his ideas effectively.

The form of footnotes varies, but each form contains all of the same essential information to identify and locate the reference. Each lists:

1. The name of the author
2. The title of the article (usually in quotes)
3. The name of the publication (underscored) and/or the name and address of the publisher
4. The volume, if any
5. The edition, if other than the first
6. The date of publication (in parentheses)
7. The pages on which the reference will be found

On page 348 are model footnotes covering the various forms used for references to books, special publications, magazines, and newspapers. Notice that commas are used to separate the parts of the footnotes and that each footnote is ended with a period.

When two footnotes immediately following each other refer to the same source, the Latin *ibid.* can be used and the correct page number added. The Latin *op. cit.* (the work cited) is used when the same source is referred to again but is separated from the first footnote by intervening footnotes. The author's name is repeated in such a footnote. *Loc. cit.* (the place cited) is used to refer again to the exact material, same page.

Page Numbering. If you are sure that the body of the report will not have additional pages, you can number them as they are typed. Last-minute changes in a report may cause pages to be inserted or deleted so that the experienced typist frequently makes page numbering the last task before binding. The top sheet of each set of pages should be numbered lightly in pencil as soon as it is removed from the typewriter, however, to avoid later confusion.

The pages of the body of the report are numbered with Arabic numbers, beginning with 1. Any of the three positions, top center, top right corner, or bottom center is acceptable.

Checking. The typed report must be checked word for word and figure for figure. The reading procedure is the same as that recommended for other kinds of typed matter—careful, slow, thoughtful reading and checking, and the marking of each correction lightly in the margin opposite the line to be changed. Some offices require that the last carbon copy be used for the

Appendix. The material placed in the appendix of a report is generally of a reference or supplemental nature. It is incorporated only when the report is long and comprehensive. The title may be "Appendix," or some other descriptive term, such as "Reference Section." The contents of an appendix are set up in the same form as the body of the report. It is usually the first part of the report immediately following the body.

Bibliography. A report that is based upon a study of published materials frequently includes a bibliography, listing the books and the publications used as source material. Such a bibliography is called a *selected bibliography.* Many business reports are based on factual information within the company, and there is no need of referring to outside source material. Such reports do not have bibliographies.

Sometimes the secretary is requested to prepare a *comprehensive bibliography.* Such a bibliography lists all of the material published on the subject for a selected period of time. An *annotated bibliography* contains a brief explanation of the content or an evaluation of each reference.

A bibliography reference is very similar in form to a footnote in that it cites the author's name, the title of the publication, the publisher, and the date. If there is an editor, a translator, or an illustrator, his name may be included. The price and complete details on the number of illustrations, plates, diagrams, etc., can be included if this information will be of value to the one who will use the bibliography. Specific chapters or sections and their inclusive page numbers should be stated if the reference appears in only a certain part of the book or periodical.

The items are arranged according to the alphabetic order of the author's surnames. Sometimes a long list is divided into parts, one part listing books only, another listing periodicals, and a third special publications. Should the publication be anonymous or printed without an author's name, a short underscored line is used in place of the author's name and the item is placed at the end of the list. Note the form of bibliography listed at the end of each chapter in this book.

The Index. An index is included only when it is felt that there will be occasion to use it. A detailed table of contents

August 17, 195-

To the General Manager and Board of Directors:

The Committee on Standardization of Forms, appointed by you on June 15 to make recommendations about standard communication forms for all departments of this organization, submits the attached report.

The Committee functioned as a group in developing certain tentative recommended forms; it followed administrative suggestions in developing others. In general, however, it dealt with controversial matters about written forms and form letters now in use in various departments.

The conclusions were reached after consulting the head of each department and two members of each department, after studying fifteen style manuals published after 1940, after holding conferences with three university teachers of business writing and three professors of industrial management, and after analyzing the forms used in five companies that manufacture the same type of product which we make.

On the basis of its findings, the Committee herewith classifies forms now in current use in the company as follows: (1) recommended, (2) accepted, and (3) disapproved. It also submits forms not now in use in this company with either of two recommendations: (1) for immediate adoption or (2) for consideration with a view to future adoption if practicable.

Each member feels that working on this Committee has given him a better insight into the problems encountered by our management and a better understanding of work simplification processes. It has been a privilege to compile the report.

Respectfully yours,

COMMITTEE ON STANDARDIZATION OF FORMS

David D. Duncan, Chairman
Natalie Bradburn
Laura Hastings
Stephen Matthews

LETTER OF TRANSMITTAL

A letter of transmittal shows the authorization for the report, outlines general procedures, suggests the major conclusions, and builds goodwill.

Table of Contents. One of the final steps is to prepare the table of contents. A long report should always have a table of contents. In its shortest form it consists of a list of the main topics or chapter titles and page numbers. It may be more useful, however, if the subheadings and their page numbers are listed under each chapter or main topic. The table of contents does not include any of the parts in the preliminary pages, but it does include the reference parts following the body of the report.

Double spacing is used before the titles of chapters or main topics, and single spacing otherwise. All important words in the chapter or main topic titles are capitalized. Leaders—lines of periods—from the end of the title to the page number, are visual aids to finding the page number quickly. A good table of contents should be easy to read and accurate. The correctness of the titles used and the page numbers cited should be checked on the report itself even though it was checked on the rough draft.

Title Page. The title page provides an opportunity for artistic typing. Even a report of five or ten pages is improved with a title page. One designed by the secretary should be simple if the report is brief and informal. If the report is long and technical, a more ornate cover page may be appropriate.

The title page must contain the essential facts for identifying the report—the title, the author, the date, the place of preparation. The essential items vary with the contents of the report. An interoffice report may require only the title and the date on the cover page. It is always best to have the employer approve the cover page because he may have definite opinions on the placement, the arrangement, or the inclusion of certain items.

Page Numbering of Other Parts. The title page of a report is not numbered. The other pages of the preliminary parts are numbered with small Roman numerals. If the title page is also the cover page, the letter of transmittal is numbered with the small Roman numeral *i*. If the report is bound, however, the title page is considered a preliminary page of the report, but it is not numbered, and the letter of transmittal is numbered *ii*.

TABLE OF CONTENTS

TABLE OF CONTENTS

The table of contents precedes the report and lists the chapter titles of each part in the order in which they appear.

The pages of the reference sections are numbered with Arabic numerals, following in consecutive order the number of the last page of the body of the report.

FINAL CHECK SHEET As a final step preliminary to binding, a last-minute, final check should be made. A technique used by some secretaries in exacting work is to devise a final check sheet for each job and, before turning in the finished job to their employers, to recheck each item listed on the check sheet. This last-opportunity checking has caught many an embarrassing error and is a device that can well be used for any task involving detail and accuracy. In a business report the final check sheet would contain such items as:

1. See that pages are numbered in proper sequence.
2. See that every indicated correction has been made on every page. It is very easy to skip a correction on one page when the same correction must be made individually on several pages.
3. See that every reference to a page number, table, or figure is correct.
4. See that every total and percentage is correct. This may mean repeating previous mathematical work, but it frequently catches an error in typing or computing.

As you work on a report, you will undoubtedly think of other items that you will want to add to your final check sheet. It will take time to make this final check, but it will greatly improve your chances for 100 per cent accuracy on the report.

ASSEMBLING AND STAPLING Papers should be assembled in reverse order—that is, the bottom page is laid out first, face up, so that the secretary can discover blank or mutilated pages while assembling them. After the pages are assembled, the sheets should be joggled together several times briskly on the desk to force the edges to line up exactly at all four corners.

Papers should be stapled across the corner, not parallel with the left corner. Such placement of the staples facilitates turning pages and reading them, and the fastening is strengthened. If the report is bound, special cover stock is generally used. This is a heavyweight colored paper in a size

large enough to cover both the front and the back of the report. The front of the cover may include the same information as the title page. Manuscript for an editor, or copy for a printer, should not be permanently bound.

PREPARING COPY FOR THE PRINTER The following points should be observed when typing copy for the printer:

(1) Use paper that is strong and durable. Never use onion-skin paper.

(2) Send one copy—the original—not a carbon copy.

(3) If a report is typed solely for the printer and not for office distribution, make one or two carbons for the office files and for use in checking the printer's proof.

(4) Use generous margins and double spacing, no matter how the copy is to be set.

(5) Indicate the kind of type face to be used in certain instances, as follows:

Boldface	Words in boldface
Italics	Words in italics
Boldface italics	Words in boldface italics
SMALL CAPS	Words in all small capitals
CAPITALS	Words in all large capitals

(6) To insert copy at a specified place on a certain page, type the new copy on a separate sheet of paper, identifying it as "Insert A, page 16." Place the typed insert immediately following page 16. Indicate on page 16 where the insertion is to be made by writing "Insert A here."

(7) Minor corrections in typewritten copy may be written in neatly or typed.

(8) To delete a few words, draw a heavy line through them.

(9) Prepare the table of contents and list of illustrations in their proper forms but leave the spaces for the page numbers blank as they cannot be inserted until page proofs are received.

The first proof of printed matter is usually in galley form—long sheets containing one column of printed copy, the width the column will be on the final printed page. Each galley must be thoroughly checked for accuracy; each kind of error or change to be made must be indicated by a certain proofreader's mark as illustrated on page 356. After galley proof has been checked and the printer has made all of the changes indicated, he submits page proof. This new proof must be again meticulously read. This is usually the final opportunity for the author to catch errors and make changes. Proofs of small printing jobs are usually submitted in page proof the first time.

REFERENCE READINGS

CROUCH, WILLIAM GEORGE, and ZETLER, R. L. *A Guide to Technical Writing.* New York: The Ronald Press Company, 1948, pp. 109–234.

GAUM, CARL G.; GRAVES, HAROLD F.; and HOFFMAN, LYNE. *Report Writing* (Revised Edition). New York: Prentice-Hall, Inc., 1942, 332 pp.

MCLAREN, N. LOYALL. *Annual Reports to Stockholders.* New York: The Ronald Press Company, 1947, pp. 267–280.

NELSON, J. RALEIGH. *Writing the Technical Report.* New York: McGraw-Hill Book Company, Inc., 1947, pp. 141–160.

PARKHURST, CHARLES CHANDLER; DAVIS, ROY; and FRAZER, WM. *Business Writing—Theory and Practice.* New York: Prentice-Hall, Inc., 1941, pp. 283–318.

SAUNDERS, ALTA GWINN, and ANDERSON, CHESTER REED. *Business Reports.* New York: McGraw-Hill Book Company, Inc., 1940, 408 pp.

QUESTIONS ON READINGS

1. Why has business report writing become increasingly important as a tool of management?

2. In what way does the corporation report for top management differ from the stockholders' report?

3. Give suggestions for making a business report readable and attractive.

4. Outline a practical form to follow in preparing a formal business report.

5. In developing an outline, what points in style should be watched?

6. If you had obtained all of the data available on a certain subject and the employer had drafted a report based on them, what would you do if in the morning's mail you received a business magazine containing an article which covers a new angle of the subject? Would you call your employer's attention to the new material, knowing that it would mean a rewrite job?

PROBLEMS

1. Prepare an index of the material in this chapter.

2. Type the following titles on one page. Divide the titles into two or more lines if necessary, and center each line horizontally on the page. Allow six line spaces between titles.

(a) The Efficient Secretary

(b) Criteria to Be Used in the Selection of Voice-Writing Equipment

(c) Standards of Production for Stenographic Work in Modern Offices

(d) Score Card to Test Efficiency of Business Departments in Secondary Schools

3. Type correctly as a footnote and as part of a bibliography the following information:

(a) An article entitled "Control of Forms," page 67 of *Manual of Practical Office Short Cuts* compiled from ideas sent in by members of the National Office Management Association by McGraw-Hill Book Company, Inc., New York, in 1947.

(b) An article called "An Analysis and Classification of Research in Shorthand and Transcription," which appeared in Volume 16 of the *National Business Education Quarterly* in October, 1947. The footnote refers to material appearing on page 50, and the entire article was printed on pages 49 to 54. The article was written by Ruth Anderson.

(c) A book written by Clyde Blanchard called *Twenty Shortcuts to Shorthand Speed*. The book was published by the Gregg Publishing Company of New York in 1939. The footnote refers to page 11. The book contains 100 pages.

PROJECTS

A. Preparing a Business Report. From the bibliographical notes that you prepared in Chapter 15 (Project B, page 310), develop a business report on one of the following topics (or a topic of your own choice which your instructor has approved). Use graphs or tables if you think they will improve your presentation.

(1) Standards of Production for Stenographic Work in Modern Offices

(2) Methods of Increasing Stenographic Output

(3) How the Beginner in Business Can Make the Necessary Occupational Adjustments Most Painlessly

(4) Salaries of Office Workers

(5) The Unionization of the White Collar Worker

(6) Employment Tests Used in the Selection of Beginning Office Workers

(7) Arranging the Office for Efficient Flow of Work

(8) Time and Motion Studies in Office Work

B. Interpreting Proofreaders' Marks. In order to provide some practice for yourself in using proofreaders' marks, indicate the method of marking both the text and the margins when the following changes are desired. *If a form is not provided for your use, set* up three columns across the page headed CHANGE DESIRED, MARK IN TEXT, and MARK IN MARGIN.

(1) You want the word *more* inserted.

(2) The word *reading* appears in the copy *readnig.*

(3) The word *usually* should be deleted.

(4) The phrase *of this* is written *ofthis.*

(5) The left margin is uneven because the letters have been set a space too far in on one line.

(6) You want to write *think* in solid capitals.

(7) The apostrophe has been omitted in the word *boy's.*

(8) You want to capitalize the word *Congressional.*

(9) The hyphen has been omitted in *co-operate.*

(10) You want to start a new paragraph where none is now indicated in copy.

(11) You decide to italicize the word *usually.*

(12) The school subjects *history, algebra,* and *social studies* have been incorrectly capitalized in the copy.

(13) In marking the copy for the preceding question, you inadvertently indicated that the word *English* should be written in lower case too. Show that you want the original capitalization to stand.

(14) You decide that *two only* should be changed to *only two.*

(15) Too much space has been left between words.

CHAPTER 18

ORGANIZING AND RECORDING MEETINGS

DURING your business career you will probably be called upon to record and prepare minutes of meetings or to report the proceedings of conferences. When the employer is a presiding officer or secretary of a group, he delegates to his secretary many duties, such as sending out the notices, preparing the meeting room, handling the follow-up items, and most responsible of all, attending the meeting and taking notes for the minutes, or abstracting them from a verbatim record of a court reporter, stenotypist, or wire recorder. This last duty signifies that the employer believes his secretary is capable of making a complete, accurate record of all the proceedings and that he vouches for her personal integrity—that she will keep to herself the happenings in the meeting. It is a responsibility and a trust. The employer assumes that the secretary will see all, hear all, but will tell nothing. It is taken for granted that her appearance and conduct at the meeting will reflect good taste, poise, and breeding.

RESERVING THE MEETING ROOM The first detail to be taken care of by the secretary in making arrangements for a meeting is that of reserving the room where the meeting is to be held. This must be done before notices are sent out. What usually happens is something similar to this. The employer says, "Will you call a meeting for next Wednesday afternoon at two on budget requests." He does not say, "It will be held in the conference room." That is where he always calls his meetings, and he takes it for granted that the secretary knows that and that the conference room will be available for his use. It is the secretary's responsibility to make sure the room is not being used that afternoon by another group. It is very embarrassing to the employer—and it is the secretary's fault—if a group tries to gather in a room that is already in use.

in some systematic sequence—alphabetic, geographic, or by groups, committees, teams, and so forth.

If the mailing list is kept on loose sheets, single spacing is used for each name and address with double or triple spacing between names. Usually two columns of names and addresses can be set up on each page. Each sheet should be identified by the name of the group and by page number. If cards are used, one name is put on each. The top card should carry the full name of the group.

Whenever the secretary finds time to do so, she addresses the cards or the envelopes for notices of the next meeting, even though the date of the meeting may not have been set. In this way she can reduce the time required to get out the notices later on. If she follows this plan, she should be careful to make any changes in names or addresses about which she is notified between the time she addresses the cards or envelopes and the time she sends out the notices.

Composing the Notice. Simple notices may be composed by the secretary and given to the employer for approval. The previous notice may be a good model to follow, but it is desirable to vary the form. Instructions for preparing the notice are given on page 364.

In case the secretary is preparing a notice of a corporation meeting, she should enclose with the notice a form on which the shareholder may execute a proxy, giving to someone else authority to vote his stock in case he does not plan to attend. This notice must include a detailed list of the business to be transacted, the reasons for soliciting the proxy, and other information specifically required by law.

Typing the Notices. For small groups the notice is either typewritten or telephoned. For large meetings the notice is printed or reproduced by some office duplicating process.

Post-card notices should be typed attractively, with the message neatly displayed. A simple, double-spaced form is acceptable for short notices. Some secretaries underline the important words. If the notices are to be run off by a duplicating process, then the *master* must conform to the mechanical limitations of the process.

April 2, 1949

To the Finance Committee--

D. W. Wiley	R. L. Crane	J. R. Downey
E. R. Donley	G. M. Nugent	E. L. Cooper
✓A. B. Shumard	R. H. Hardy	M. M. Brock
C. D. Bateman	Z. L. Ralston	E. E. Evers

As you know, our budget for the fiscal year beginning July 1, 1949, and ending June 30, 1950, must be approved not later than June 1. This means that our suggested budget should be submitted to the Board of Directors for their comments and suggestions not later than May 15. In order that work on this matter may be started just as soon as possible, let us plan to meet

DUPLICATED NOTICE

A duplicated notice may list all members of the committee in one operation and inform the recipient of the notice of the names of the entire membership of the group. The name of the person to receive the notice is checked.

Some meetings or conferences are of such importance that the announcement is typed or duplicated on letterhead paper. If only a few names are involved, a tabular listing of the names of those to receive the letter may be typed in place of the usual single name, address, and salutation. The salutation then is a general one, such as "Dear Member," "Dear Committee Member," or "Dear Mr. ....," with the name to be filled in later. Modern usage permits the omission of the salutation entirely. An individual letter to each person is sometimes used, but that is a time-taking procedure.

Before a notice of a meeting is sent out, the executive or his secretary should check the bylaws of the organization for any stipulations that the notice contain certain information before an item can be acted upon at the meeting. For instance, the bylaws may require that the notice include a statement that the question of the payment of dividends will be discussed before dividends can be voted at the meeting.

Handling the Follow-up Work. The secretary's follow-up duties consist chiefly of recording who and how many will or

will not attend the meeting. If return post cards have been furnished, this is merely a matter of sorting the cards into the "will's" and "will-not's." But usually it means also telephoning several persons for a definite "Yes" or "No."

The official secretary of the Forum Club in a large city sends out multigraphed notices one week before the monthly luncheon meeting. Two days before the meeting his secretary telephones each member to ask if he will or will not attend the luncheon. She keeps a record on a sheet of three columns—one wide one for names and two narrow ones for the acceptances and the refusals. As soon as answers are in from all the members, she telephones the hotel, giving the exact number of reservations. A quick method is to use a duplicated form that includes the names and the telephone numbers of members. Each name can be checked off as an answer is obtained. The frequency of meetings determines whether or not the preparation and duplication of a special form of this kind is justified.

A helpful secretarial service on meeting day, especially if the group is small, is to make reminder telephone calls to those who should attend. Early in the morning of meeting day the secretary calls each person, or preferably his secretary, and tactfully reminds him of the meeting. A diplomatic way to do this is to call up and inquire of the secretary if the employer plans to attend such and such a meeting called for such and such a time, adding in explanation that you are making a final check on probable attendance. Some members may be unable to attend for last-minute reasons; others may explain that they will be late. Fortified with such knowledge, the chairman can call the meeting to order promptly.

PREPARING THE ORDER OF BUSINESS Every meeting follows some systematic program, which is planned and outlined before the meeting. This program is usually called the *order of business* in organized groups. It is called the *agenda* in academic meetings and conferences. *Calendar* is the term used at meetings of some legislative bodies, such as a city council.

If the employer is to be the presiding officer at the meeting, several days before the meeting the secretary should remind her employer to prepare the order of business. If she knows the purpose of the meeting, she can probably prepare it in

LAST-MINUTE DUTIES The secretary's first duty on meeting day is to check on the meeting room to make sure that it is ready; that the air in the room is fresh; that there are enough chairs, ash trays, matches, paper, pencils, clips, and pins.

Unless she has previously done so, the secretary's next job is to gather together all of the material that will be needed at the meeting—notebooks, pencils, a filled fountain pen, the minute book, reports. It is most embarrassing if the secretary must leave the meeting room several times for things that she should have brought along. It advertises that the secretary is not very thorough. On the other hand, offering to get records or material on subjects that are unexpectedly discussed shows eagerness to please. The secretary should never leave a meeting room, however, without first getting permission from the employer or presiding officer. She is there to get the data for the minutes, either through her own notes alone or through verbatim recordings of a professional reporter or wire recorder, supplemented by her own notes which will aid her in abstracting the important points from the mass of material.

The secretary should study the minutes of previous meetings to familiarize herself with the usual procedure. An analysis of techniques used in radio round-table discussion and a study of manuals of parliamentary procedure may also be helpful. If she has noted from the order of business the names of those who are to present certain topics at the meeting, she will be able to record this information easily in the minutes the day of the meeting.

Before the meeting opens, the secretary may have to make introductions, acknowledge introductions, or help the employer on some last-minute arrangements.

THE SECRETARY AT THE MEETING If the secretary is to take full notes, she concentrates on taking minutes as unobtrusively as possible. She should, however, ask to have everything repeated that she does not hear distinctly or that she is unable to get into her notes. She may say, "I did not get that," or she may give a prearranged signal to the Chair, such as raising her left hand slightly. Then the chairman will ask that the point be repeated. An error or an omission in procedure

that the secretary observes can be pointed out to the Chair by a brief note tactfully phrased.

It is better to take too many notes than too few. No one turns to the secretary in a meeting and says, "Take this," or "You need not take this." The secretary is simply held responsible for getting everything important in her notes. She must keep on the alert for motions, amendments, and decisions. If she is afraid to decide at the instant whether remarks are important, she should record them. If they are not important, they can be omitted from the final draft.

Some essential parts of the minutes may not be specifically recorded at the time of the meeting. The date, the time, the place, and the name of the presiding officer may not be stated. The roll may be called; but if not, the secretary is expected to

SECRETARY TAKING MINUTES OF A MEETING

Note that the secretary is seated near the presiding officer.

Harold M. Lam…

observe and to record all of the details of attendance—who attended, who did not attend, who came in late, and who left early. The last two items of information are important in recording action on measures voted upon. Those not wishing to go on record with their votes may absent themselves from a part of the session for just that reason. To report the attendance of a person at the entire meeting when he attended only a part of it is an error.

Attendance is of importance also in the matter of quorums. A quorum is the minimum number of persons in an organized group legally able to transact business. The number constituting the quorum is stated in the bylaws.

If the secretary is depending on a verbatim report of the meeting as her source of minutes, she will need to make notes of items which are not likely to appear in the record: the names of those attending, the official title of the speaker, the time of meeting and adjournment, the names of those voting "Yes" and "No" to motions, the names of those coming in late and leaving early, and possibly the difficult names and words which may cause confusion in transcription. If she outlines the proceedings during the meeting, she can more easily make necessary fill-ins when she works with the verbatim report.

If it is the secretary's duty to read the minutes of the last meeting, she should read them in a meaningful manner and in a loud enough voice so that everyone in attendance will be able to hear without difficulty. Too frequently minutes are read hastily as if the secretary regarded them as a necessary evil. The reading of the minutes, however, serves a very worthwhile purpose. The business of the present meeting cannot be conducted very intelligently unless those in attendance know what matters were considered and what decisions were made at the last meeting. Those who attended the previous meeting may have forgotten some of the details of the proceedings; for them the minutes serve to refresh their memories. Others present may have been absent from the last meeting and need to become familiar with the actions taken at that time. Furthermore, the unfinished business of the last meeting carries over to the present meeting.

After the minutes are read, the presiding officer asks for corrections and additions to them. Usually this is a mere

RESOLUTION

Adopted July 20, 195-

WHEREAS the Springfield Credit Managers Association has had an unusually successful record in the past year; and

WHEREAS that record has been due in large measure to the untiring efforts of our President, Mr. E. G. Black, and the Chairman of our Program Committee, Mr. W. B. Carr: Therefore be it

<u>Resolved</u>, That the members of this organization go on <u>record as</u> expressing enthusiastically their appreciation to Mr. Black and Mr. Carr; and be it further

<u>Resolved</u>, That our secretary present a copy of this <u>resolution to</u> each of these men.

H. D. Wilkins

H. D. Wilkins, Secretary

RESOLUTION

A resolution usually is made up of formal statements with each paragraph beginning with WHEREAS or RESOLVED typed in capital letters or underscored.

an appropriate resolution. After the meeting the secretary is responsible for composing or typing the resolution, having it signed and sent out, and incorporating it in the minutes.

WRITING THE MINUTES OR PROCEEDINGS Many a secretary has left a meeting feeling very uneasy about the readability or completeness of her notes. This is a natural reaction, for it is difficult to take notes steadily at full speed and concentrate on the subject matter. Therefore, it is best to transcribe the notes that very day while they are still fresh in the memory. If that is impossible, the secretary may find it desirable to take the notes home and read them through, getting them into order and fixing them in mind for accurate transcription the next morning.

The first transcription may be roughed out verbatim in triple spacing for correcting and editing. The secretary who frequently writes minutes for the same organization may eliminate the verbatim transcription of notes and start at once on roughing out a draft in proper form. This draft should be

MEETING OF MAY 25, 195-

Time and Place of Meeting	The regular monthly meeting of the Springfield Credit Managers Association was held on Thursday, May 25, 195-, in the Palm Room of the Reynolds Hotel. The meeting was called to order at 8:10 p.m. by the president, Mr. Newman.
Roll Call	There were nineteen members present.
Reading of Minutes	The minutes of the April meeting were approved as read by the secretary.
Treasurer's Report	The treasurer presented his monthly report showing a balance of $42.35. This report, a copy of which is attached, was accepted. Two small bills, amounting to $10.15, were presented and approved for payment by the treasurer.
Committee Reports	The president called for special committee reports that were ordered for this meeting. The report of the Auditing Committee was read by Mr. Thompson, the chairman, who moved THAT THE REPORT BE ACCEPTED. The motion was seconded and passed. A copy of the Auditing Committee report was filed with the secretary.

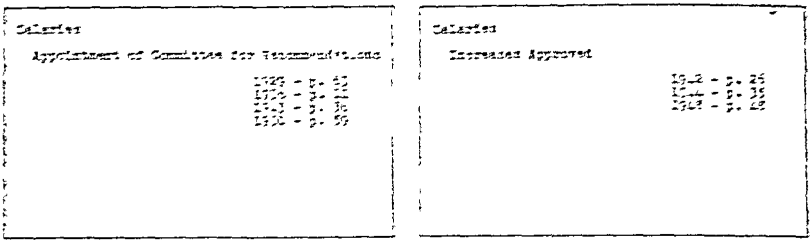
MINUTES OF A MEETING

These follow the order of business given on page 366. They indicate whether the meeting was a regular or a special one. Subheadings at the margin aid the reader, and motions are typed in solid capitals.

Many employers send a summary of the action taken at each meeting to all members of the group, so that they may file it for reference.

INDEXING THE MINUTES Because the composition of committees and organizations is constantly changing, sometimes groups find themselves in embarrassing situations because they do not know the regulations which they, as a body, have previously passed. They may take an action contrary to required procedure; they may violate their own regulations; or they may pass motions that contradict each other. The presiding officer takes a look at old minute books, which have been preserved since the beginning of the organization, and decides that it will be impossible to ferret out the separate actions on recurring problems. Nothing that you could do for the harrassed officer could be more helpful than the preparation and main-

tenance of a cross-indexed subject file of cards listing the page number and year of each action taken.



SAMPLE FILE CARDS

On these cards are found the years of action and page references to actions taken on the subject of salaries. Both of these cards follow the subject guide *Salaries*.

If captions are written in the margin of the minute book beside the motion passed, the preparation of the index file is facilitated.

MINUTES OF CORPORATIONS Corporations are usually required by law to keep a minute book for recording the minutes of meetings of stockholders and directors. Stockholders usually meet once a year, but directors' meetings are held more frequently. Minute books are extremely important legal records. Recorded decisions must be carried out, for they constitute the regulations to which the management must conform.

The records of a corporation are kept by the corporation secretary, a full-time officer of the company, whose duties differ greatly from those of the secretary discussed in this book. He is a company executive and will probably employ a secretary whose duties approximate those described here.

Auditors who examine the accounting records of a corporation read the minutes carefully to see that all financial decisions have been executed. They observe whether all transactions entered into by the corporation, which are of a nature required by law or by the company's charter to be passed upon by the board of directors or stockholders, are authorized or approved in the minutes. For instance, an item in the minutes to pay a

dividend of $1 a share on common stock as of a certain date makes it legally mandatory that such a dividend be paid.

One large company whose success and continued operation depended upon a certain process patented by its founder learned upon his death that the heirs were claiming royalty rights to the patent. The founder had stated verbally his intention of passing the patent rights on to the company itself. A statement to that effect, which was found in the minutes of a meeting held fifteen years previously, was upheld by the courts.

The Minute Book. Two separate books are frequently used for corporate minutes, one for stockholders' meetings and one for meetings of the board of directors. If only one book is used, a portion of it is assigned to each group so that each set of minutes can be entered in consecutive order. A corporate minute book may also contain a copy of the certificate of incorporation and a record of the bylaws adopted.

The minute book may be bound or loose leaf. The latter is preferable, for it permits the typing of the minutes. In order to prevent substitution or removal of sheets, one of the following types of loose-leaf books is used:

(a) One with prenumbered pages, and each page signed by the corporation secretary and carrying the date of the meeting
(b) One with pages watermarked with a code symbol
(c) One with keylock binder, making it impossible to remove or insert sheets without the use of a key

Papers are seldom made a part of corporate minutes, but if so, they are pasted into the book. The final copy of the minutes is signed by the officers required to do so. Corrections are written in and the incorrect portions ruled out in ink. These changes are initialed in the margin by the signers of the minutes.

Contents of Corporate Minutes. The following information is recorded in corporate minutes:

(1) Membership of group—directors or stockholders
(2) Date and place of meeting
(3) Kind of meeting—regular or special
(4) Names of those attending, together with the number of shares owned and their proxies if received
(5) A complete record of the proceedings of the meeting

Ordinarily the responsibility for formal minutes is given to the official secretary of the company. His secretary may help in the routine work of typing the minutes, but he carries the full responsibility of their completeness and accuracy. A secretary entrusted to work upon them has every reason to feel that she has been complimented.

REFERENCE READINGS

BROWN, STANLEY M. (Editor). *Business Executive's Handbook.* New York: Prentice-Hall, Inc., 1942, pp. 1423–1463.

CARNEY, MARIE. *Etiquette in Business.* New York: McGraw-Hill Book Company, Inc., 1948, pp. 353–390.

DORIS, LILLIAN, and FRIEDMAN, EDITH. *Corporate Secretary's Manual and Guide.* New York: Prentice-Hall, Inc., 1949.

HEYEL, CARL. *Standard Business Conference Techniques.* New York: Funk and Wagnalls Company, 1948, pp. 63–80, 197–202.

QUESTIONS ON READINGS

1. What duties must the secretary perform before a meeting is held?

2. If the secretary telephones to make a reservation for a meeting place at a local hotel, should she also write a letter of confirmation for the reservation?

3. When should you send notices for each of the following meetings:
   (a) A monthly luncheon meeting for which reservations must be received not later than the day preceding the meeting.
   (b) A meeting of the board of directors of a large corporation. All committees must present full reports.
   (c) An office conference to discuss a new production problem.

4. If ten department heads are called together for a conference to discuss the plans of the company for the next fiscal year, why would it be helpful for the secretary to give each department head a copy of the order of business prior to the meeting?

5. What is the usual order of business in a meeting?

6. How can the secretary familiarize herself with the usual procedures followed by the group so that taking minutes will be facilitated?

PROBLEMS

1. Your employer, J. M. Hinton, is secretary of the Cleveland Credit Managers Association. The regular monthly meeting of that organization was held on Thursday, June 22. The week before, you had mailed notices of that meeting to be held at 6:30 p.m. at the Hollenden Hotel.

Mr. Hinton gives you the following notes for the minutes of that meeting. You are to type the minutes in good form, using marginal or side headings for each paragraph. Mr. Hinton also instructs you to do these things as follow-up work: (a) Notify Harmon Johnson of his nomination, as he was absent; (b) Write a note of appreciation to the speaker, enclosing a check for $27.50 which the treasurer drew for his expenses. (Since Mr. Hinton does not have any stationery of the Cleveland Credit Managers Association, you will use plain stationery.)

Called to order—8:05 p.m.

Mr. Newman, pres., absent—Mr. Stewart, v.p., presided.

No. present—16. Minutes of May meeting read by secy.—approved.

Treas. report—present bal.—$35.72. Accepted (copy of report given to you by Mr. Wingate). No bills presented for payment.

Budget Com.—Hamilton, chairman. Acceptance moved and seconded. Discussion. Motion carried.

Membership Com.—Becker, ch., introduced 2 new members—R. M. Hale and J. C. Fisher.

Nominating Com.—Green, ch. Officers nominated for year beginning Aug. 1.

President—Johnson, Kennedy
Vice-President—Thomas, Martin
Secretary—Sawyer, Baker
Treasurer—Piper, Lawrence

Acceptance of report moved, seconded, and passed. No nominations from floor. Nominations closed by motion. Stewart announced election of officers to be held at next regular meeting as provided in the constitution.

Kennedy, ch. of Program Com., reminded members of golf tournament and dinner—Springfield Country Club, afternoon and evening of June 29.

Martin introduced Mr. Raymond Clark of Chicago as speaker. Subject—"Trends in Installment Credit." Question and answer period.

Mr. Stewart announced July 27—date of next reg. meeting. Motion for adjournment carried. 9:37 p.m.

2. You have been appointed chairman of a committee in the local chapter of the National Secretaries Association to prepare a resolution of appreciation of the services of Miss Mary Stewart, who founded the local organization and is retiring as president after serving for two terms. Miss Stewart is also a member of the State Board of the organization and has contributed two articles to the national magazine. Draw up the resolution.

PROJECTS

A. Preparing Notices of Meetings. (1) Send a post-card notice of a luncheon meeting of the Metropolitan Club at one o'clock at Younkers Tearoom, on June 24, to Mr. Henry Hayes, 816 East South Street, Des Moines 6. The topic of a panel discussion that will constitute the program is: "How to Make Des Moines Schools Better." Experiment with the organization of the material until you feel that you have designed the notice in the most effective and attractive way so that you can use it as a model for each monthly meeting. This notice is sent in the name of your employer, Mr. Simpson, as secretary of the Metropolitan Club.

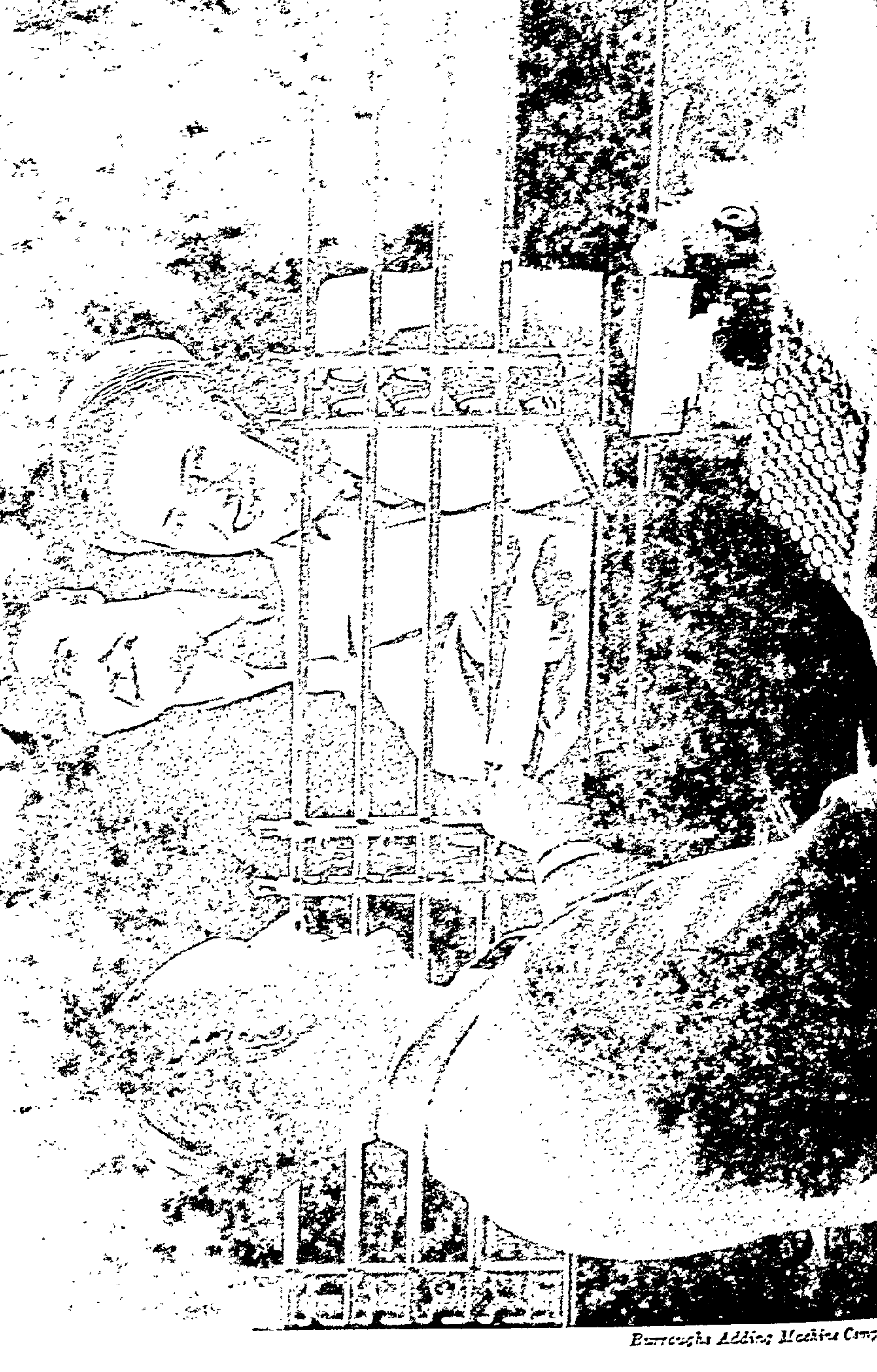
(2) Also send Mr. Hayes a notice of the monthly social meeting of the Hobby Club to be held Friday night of next week at 8:30 at the home of the president, M. J. Kohler, at 6118 Grand Vista Avenue. Mr. Kohler would like to know how many are planning to attend because refreshments are to be served. Ask that he call your office, MAin 4108, by Monday evening. There will be a special display of woodworking projects. This notice is also sent by Mr. Simpson.

B. Interoffice Notice of Meeting. Compose and type an interoffice communication notifying the key men in the factory of a conference to be held on safety measures. There have been four accidents in the past month, one fatal. Each is to come prepared with specific suggestions on safety measures and ways to improve the safety record. The meeting will be held in the Foremen's Dining Room at 3:45 p.m. ten days from today. The following men are asked to attend:

E. G. Ames	James R. Kingston
Paul Bencoe	Clyde Morningstar
B. A. Carns	Harry Townsend
George Dobbing	Lewis White
Bert Hamilton	Anthony Wilson

PART V

FINANCIAL AND LEGAL DUTIES OF THE SECRETARY



Burroughs Adding Machine Com

CHAPTER 19

BANKING ROUTINE

THE private secretary frequently takes care of the employer's personal banking and, if there is only a small staff, the office banking as well. Her banking duties may take up only a few hours of each month, but they are laden with real responsibility. Accuracy, above all, and dependability in handling the money and records are necessary in addition to the constant need for treating all financial duties as strictly confidential.

Anyone who is, or hopes to be, capable of handling another person's money and accounts must know banking procedures and terminology. Although practices vary slightly with different banks, the basic banking functions are the same.

SEGREGATION OF CONFIDENTIAL BANKING If the secretary deposits all of the checks received by the employer—his salary check, his dividends, his rental checks, and so on—she probably also makes out most of his checks and knows his full financial situation; but if he wants to segregate his confidential banking, he handles it in one of two ways:

(1) By keeping two checking accounts—one a working fund for the secretary, and the other a strictly personal account for himself. He takes care of the paper work on the personal account, and she on the working account.

(2) By keeping only one account but two checkbooks, one for the secretary and one for himself. The secretary enters periodically in her checkbook a fixed sum on which to write checks; the remainder of the deposits are handled through his checkbook. Routine disbursements are paid from the secretary's checkbook; and personal and unusual ones, by the employer from his book. He must reconcile the bank statement himself, however, if he maintains this system.

THE SECRETARY AT THE BANK The new secretary must be identified at the bank as representing the employer or his business. On her first trip to the bank she should inform the

may be made out in duplicate instead. The teller keeps the original slip and the money deposited, stamps the other slip "Duplicate," notes the date, and signs his initials. The signed duplicate slip is the depositor's record and receipt. This slip may be placed in the passbook at the office and the amount entered the next time a deposit is made with the book, or it may be filed and subsequently checked with the bank statement. If the passbook is lost, the bank should be notified immediately so that a new one can be prepared.

Making Out a Deposit Slip. On a deposit slip the total paper money is entered on the currency line; the total coins, on the silver line. The checks and the other remittances are listed singly on the remaining lines. Checks may be identified in any of three ways:

1. The bank's transit number as assigned to it by the American Bankers Association (ABA)
2. The name of the bank if it is a local one
3. The city in which the bank is located if the check is drawn on an out-of-town bank

The ABA number is printed in small type on the face of every check to identify it in clearinghouse functions. It is a two-section number, such as 11-13. The first number indicates the city or state and the second, the specific bank in that city or state. When the number is written in fractional form, as $\frac{11\text{-}13}{2}$, the lower number refers to the Federal Reserve district.

Banks that photograph all deposit slips and checks deposited with them do not require any identification of checks because the microfilm provides permanent record. However, the secretary may identify checks on her copy of the deposit slip for record purposes.

When a large number of checks are regularly deposited, it is common practice to list the checks on an adding machine and to attach the tape to the deposit slip, listing only the total, identified as "checks," on the deposit slip.

Other remittances include bond coupons and money orders. Bond coupons are identified on the deposit slip by the name of the issuer and the description of the bond. Money orders need only be identified by source—post office or express.

Finally, the deposit is totaled and entered on the slip.

Handling the Deposit. Banks prefer that coins and bills, if in sufficient quantity, be put in the money wrappers that the banks furnish. Coins are packed in paper rolls as follows:

DENOMINATION	NUMBER OF COINS TO A ROLL	TOTAL VALUE OF COINS IN ROLL
Pennies	50	$ .50
Nickels	40	2.00
Dimes	50	5.00
Quarters	40	10.00
Halves	40	20.00

Bills of each denomination are made into packages of fifty dollars, one hundred dollars, and so on. They are separated into all-of-a-kind groups with each bill laid right side up and top edge at the top. A paper bill wrapper—a narrow strip with the amount printed on it—is wrapped tightly around the bills and securely glued.

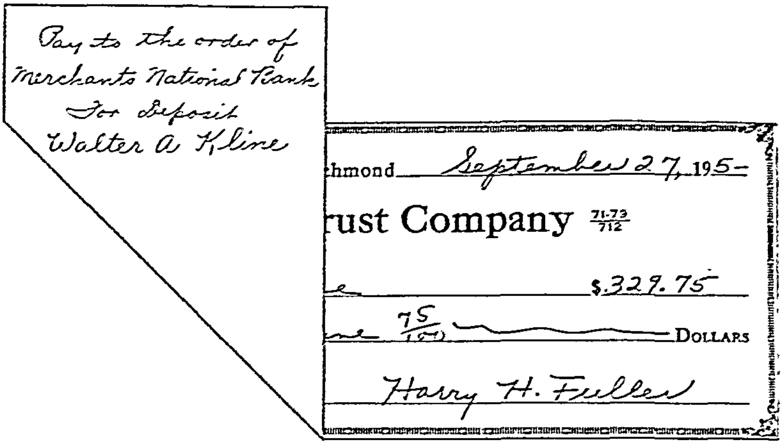
The depositor's name should be written on each roll of coins and package of bills. Receiving tellers of banks do not stop to count packaged money when taking deposits, but they do count it later in the day. A mistake can easily be charged to the proper account if the depositor's name is put on each roll or wrapper.

Extra currency is counted out, right side up, the largest denominations on the bottom and the smallest ones on top. The entire packet of bills should be encircled with an elastic band. Extra coins are counted out, placed in an envelope, and sealed.

Checks to be deposited should include the words "For Deposit" in the endorsement. Checks endorsed in this manner need not be signed personally by the depositor but can be endorsed or stamped by the secretary. The "For deposit" qualification automatically keeps a check from being negotiated if it falls into unscrupulous hands. It can be used only for deposit to the account of the depositor whose name appears in the endorsement.

A rubber stamp endorsement form can be purchased through the bank or an office supplies dealer. It is not necessary to add a pen signature to a rubber stamp endorsement if the check is to be deposited.

Finally, the deposit is made into a compact package for carrying to the bank. A cumbersome deposit is usually put into



ENDORSEMENT FOR DEPOSIT

Endorsements should be made across the back of the left end of checks and money orders.

a paper or a cloth bag or is wrapped securely in a package. Secretaries usually carry big, roomy purses for just such purposes as banking. A very bulky deposit can be tucked away in a commodious purse.

MAKING WITHDRAWALS FROM A CHECKING ACCOUNT A withdrawal from a checking account is made by check. Checkbooks with one or more checks to a page are furnished by the depositor's bank. Many business offices use prenumbered checks with the name of the business imprinted on the face of each check. No matter what kind of checkbook is used, it is the secretary's responsibility to get a new checkbook before the old one is completely used.

Writing Check Stubs. Writing out stubs and checks is an exacting responsibility. The record on the stubs must be kept accurately in ink and reconciled periodically with the bank statement.

Stubs are discussed first for a special reason. Too often a check is written, sent out, and the stub forgotten—a real calamity. This cannot happen if the stub is filled in first. According to our custom of working from left to right, the check

stub is naturally filled in first. All of the information to be shown on the check itself, plus any other data that will help in classifying or breaking down the disbursement in bookkeeping or tax records, should appear on the stub. The number of the check, the date, the name of the payee, and the amount must appear on the stub. If the amount represents several items, these should be listed individually. If the check represents a part payment, an installment payment, or final payment, that fact should be noted. If the check represents a premium on an insurance policy, the name of the insured and the policy number should be listed.

The amount of the check must be accurately deducted from the previous stub balance. It is well to develop the habit of verifying each subtraction and addition.

Occasionally the employer will cash a counter check—that is, stop at the bank, fill in one of the special check forms supplied at the counter, and withdraw money from his account. Counter checks should be entered and deducted from the stub balance just as soon as the secretary is told of them. Unfortunately the employer sometimes forgets to tell the secretary, and she first learns of cashed counter checks when she attempts to reconcile the monthly bank statement.

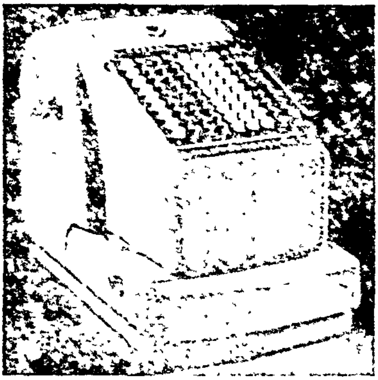
Deposits must be entered on the check stubs promptly. The amount of the deposit is added to the balance brought forward from the preceding stub before the amount of the check for that stub is subtracted. The date of the deposit need not be indicated unless that date is different from the date of the check for that stub.

Writing Checks. The drawer or depositor must exercise diligence in writing checks. The parts of the check that are especially vulnerable to alteration are the amount, the name of the payee, and the endorsement. Mechanical and chemical methods may be employed in an attempt to change any of these parts. In writing checks, the American Institute of Banking recommends:

1. That good ink and plenty of it be used to increase the difficulty of its removal.
2. That large, bold figures be written up close to the dollar sign and sufficiently close together to prevent the insertion of other figures. Little space is needed to change a

when, after the genuine signature has been affixed, a material change is made, such as raising the amount. A forged check is not valid, but an altered one is good to the extent of the original intention of the drawer. No check that contains erasures should be sent out because the bank teller may suspect the person cashing the check of altering it.

Checks should be numbered in sequence to aid in handling them when they are returned by the bank. Business checkbooks are frequently prenumbered as a means of control over the use of each check. Any prenumbered check made out incorrectly should be plainly marked *VOID* and saved. The stub should also have *VOID* written conspicuously across the face of it. The voided check itself is filed in numerical order with the canceled checks when they are returned from the bank. It is not an unforgivable offense to spoil a check or two and to have an occasional voided stub on record, but, of course, the fewer the better.



The Todd Company

CHECK PROTECTOR
This machine perforates and inks the amount into the check paper to prevent any alteration.

Cashing Checks. In order to make a withdrawal from the checking account for the depositor's use, a check is usually written to *Cash* as the payee and signed by the depositor. Such a check is highly negotiable and can be turned into money by anyone into whose hands it may fall. For this reason, utmost care must be taken of checks made out to *Cash*. The bank usually asks the person receiving the money to sign his name on the back.

The employer may expect the secretary to see that he is always supplied with cash. On banking days she simply asks, "Do you need money?" If he does, she can write the check and give it to him for signing, unless she is authorized to sign checks. The employer need not endorse these checks if they are payable to *Cash*. His signature as maker is sufficient.

The employer's funds should always be kept separate from the secretary's. One secretary, in order to be sure of the funds she receives from cashing a check, places the money in a pay envelope requested from the teller. This she seals and drops into her purse for "intact" delivery. She takes no chances of spending any of this money.

Stop-Payment Procedure. Payment on a check may be stopped after it has been issued if it has not been cleared by the bank upon which it was drawn. Payment may be stopped because the check has been lost in the mail or for any one of a number of other reasons. The bank is not interested in the reason when a stop-payment order is given.

To stop payment, the secretary should telephone the stop-payment desk of the bank and give the name of the maker, the date of the check, the amount of the check, and the name of the payee. The secretary should then dispatch a confirming letter to the bank immediately or use a stop-payment form supplied by the bank. Before writing a corrected or duplicate check, she should request the bank to examine the canceled checks on hand to see whether or not the check has cleared.

RECONCILING THE BANK ACCOUNT

Once each month most banks return to depositors the canceled checks that they have paid out of the depositor's account, a statement listing each deposit and withdrawal, and the service charge for the period. This permits the depositor to check the accuracy of his checkbook with the bank records and to file his canceled checks as proof for payment of debts.

When the statement and canceled checks are received, the final balance on the statement and the bank balance, as shown in the checkbook, should be compared to see if they agree. If they do not agree, the following is a simple procedure for reconciling the two balances:

(1) Arrange the canceled checks returned by the bank in numerical sequence.

(2) Compare the returned checks with the stubs in the checkbook. Indicate on stubs by check mark those that have cleared (been returned).

STATEMENT OF YOUR ACCOUNT WITH

MERCHANTS NATIONAL BANK
CLEVELAND OHIO

REPORT PROMPTLY ANY CHANGE IN YOUR ADDRESS

Walter A. Kline
236 Mt. Vernon Avenue
Cleveland 9, Ohio

CHECKS			DEPOSITS	THE LAST AMOUNT IN THIS COLUMN IS YOUR BALANCE	
			BALANCE FORWARD	Apr. 4	300.00
125.00	7.16			6	167.84
21.65	3.75	14.12		9	128.32
			184.75	12	313.07
46.20	18.40			13	248.47
			100.00	19	348.47
75.00	33.65		99.95	23	339.77
66.80	5.30			27	267.67
8.85	33.19	.21		30	225.42

PLEASE EXAMINE AT ONCE AND REPORT ANY DISCREPANCIES OR ERRORS TO OUR AUDITOR WITHIN TEN DAYS.

VOUCHERS RETURNED 14
SHEET NUMBER ______

MONTHLY BANK STATEMENT

The monthly bank statement shows the deposits, as well as the checks and other deductions made from the account.

(3) List on the statement, or on a blank sheet to be attached to the statement, all of the checks that have not cleared (outstanding) from previous statements and the current check stubs. Show the number of each such check, the payee, and the amount. Strike a total.

(4) Deduct the total of the outstanding checks from the balance as shown by the bank. The remainder should be the balance appearing on the last stub for the period being reconciled, unless a service charge is involved.

(5) If a service charge has been made, it is listed among the withdrawals on the bank statement, and a form itemizing the

4. Next, check the arithmetical computations on each stub.
5. When the error is located, mark the stub where it occurs, "Error, should be $____. Corrected on stub #________." Then make the compensating adjustment on the last stub.
6. Enter the amount of the error on the statement of reconciliation and show where the error occurs and where it is corrected in the check stubs.
7. Last of all, write "Agrees with bank statement, (*date*)" after the proper check stub—the last transaction covered by the bank statement. The beginning of next month's work of reconciliation will then be easily found.

The canceled checks may be kept inside the folded statements, which should be filed chronologically, or the statements may be unfolded and filed separately and the checks filed numerically. Canceled checks must be saved, for they are evidences of payment and constitute legal receipts.

BANK OVERDRAFTS Overdrafts occasionally happen, but they are the embarrassing results of careless checkbook work. An overdraft may occur when counter checks cashed at the bank are not entered and deducted in the check stubs or because of errors on the stubs. If the employer tells the secretary every time he cashes a counter check, the first will not happen; and if the secretary checks and double checks the stub computations each time an entry is made, the second is not likely to happen.

SPECIAL KINDS OF CHECKS Although most of the payments handled by the secretary will probably be made by ordinary check, she may on occasion use one of the several special forms.

A *certified check* is a regular depositor's check that is guaranteed by the bank on which it is drawn. The one who draws the check presents it to an officer of his bank who, after investigating to see if there are sufficient funds in the depositor's account to cover the check, stamps on the face of it "Certified" and then adds an official signature. The account of the customer is charged immediately with the amount of the check. The money is transferred by the bank to a special account on its books. Thus the bank guarantees that the funds for the payment

employer is rushed, he may say, "Will you write these checks for me?" It is then that the secretary has a chance to show that she is capable of handling this responsibility.

Step by step, bill paying consists of:

1. Verifying the items and checking the computations on each bill to see that the amounts are extended and added correctly
2. Filling in the check stub, being sure to itemize fully and to identify the expenditure so that the stub record will be usable in preparing accounting records or income tax returns
3. Making out the check in ink or on the typewriter and check protector
4. Writing on the face of the invoice or the statement the date, the number, and the amount of the check used in payment
5. Addressing the envelope
6. Tearing off the stub of the bill that is to be mailed with the check

Coleman & Sons
11-12 BARCLAY STREET
Cleveland, Ohio

Sold to James C. Leonard
3154 Elberon Avenue
Cleveland, Ohio
Shipped Via Delivered

Date May 11, 195-
No. 390
Terms Net 30 days

5	gals. Excello Paint – White	2.40	12.00 ✓
2	qts. Excello Varnish	.95	1.90 ✓
			13.90 ✓

[illegible]

VERIFIED INVOICE READY FOR FILING

The check marks indicate that the arithmetical calculations have been checked. The number and the date of the check used in payment should always be indicated on the invoice.

7. Attaching the stub from the bill to the check; inserting both under the flap of an addressed envelope ready for presentation to the employer

Verifying Bills. When the employer gives bills to the secretary to pay, she can assume that he approves their payment, but she should verify the prices, the terms, the extensions, and the additions. The bills may be invoices, statements, or just plain bills. An invoice covers goods purchased from another business house. A statement is a monthly summary of an account showing the balance due at the beginning of the month, the purchases made during the month, the payments made, and the amount still due. Just plain bills are all other bills including those for services rendered by professional persons, utility companies, dues and premium notices, and so forth.

Invoices should be checked with the prices and terms quoted or with previous prices paid. Statements should be checked with the last month's statement to see that the amount carried over is correct, with the invoices covering purchases during the month, and with the record of the payments made on the account. Bills for services rendered by utility companies are usually accepted as they are, although the toll statement with the telephone bill is checked very carefully. Professional services of the doctor, the lawyer, and so on must be personally approved by the employer, for the secretary will not always know if they are valid.

Filing Paid Bills. Some logical system should be set up for filing paid bills, for they provide the key to the canceled checks. If there are only from ten to twenty each month, the secretary can place all of them in one file folder. If there are many, she may set up an alphabetic file for them, or she may use a subject file, keeping together all of the utility bills, the insurance bills, the bills for supplies, etc. Whenever a question arises concerning the payment of a bill, the secretary should be able to locate the annotated bill giving the check number and then to get the canceled check from the files for evidence.

THE PETTY CASH FUND

A petty cash fund is a small amount of money given to an office employee from which to pay minor expenses as they occur. In accounting

circles it is known as an *imprest fund*, for it provides funds for disbursements in advance of their occurrence. The secretary to an executive in a large organization may handle a personal petty cash fund for him.

If the fund is of a considerable amount, it should be kept in a locked cash box and stored in the office safe or vault at night. If it is a small amount, it can be kept in a small pasteboard box or a heavyweight envelope. In any event, the fund should be locked away at night in a desk drawer, a file drawer, or the safe.

Petty Cash Records. The petty cash fund is usually set up with a stipulated amount, such as a $10 fund. Each replenishment of the depleted fund brings it up to $10 again. For example, after the secretary has disbursed $9.20 from the fund, she has on hand 80 cents. The reimbursement check to the petty cash fund is in the amount of $9.20. The employer may prefer to write a check for a full $10 each time, or he may give the secretary $10 one time, $5 another, and $15 still another. As long as the fund is purely personal, its size can be kept as desired.

Pads of petty cash receipt forms, or vouchers as they are sometimes called, are sold by stationery stores for a nominal sum. Each expenditure should have a receipt covering it for an accounting record. If receipts are used consistently, the

PETTY CASH RECORD

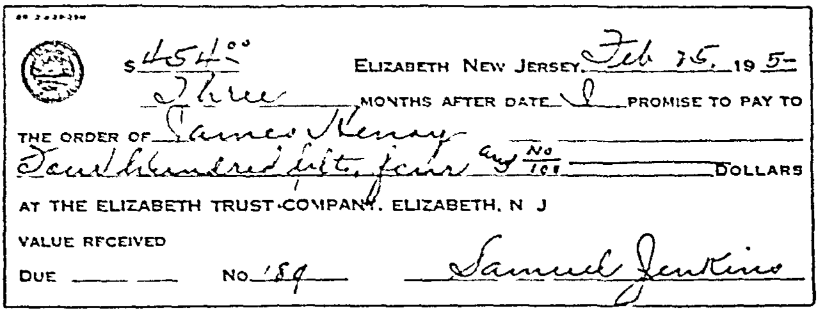
Date		Explanation	Received	Paid
195– Jan.	4	Check #15	5 —	
	4	Stamps		1 —
	8	Book on flower gardening		2 25
	16	Registry of letter to A.O.P.		25
	20	Contribution to flowers for R.T.		[illegible]
	21	Magnifying glass		25
	22	Totals	5 —	4 75
	22	Balance		25
			5 —	5 —
	26	Balance	25	
	26	Check #24	4 75	

PETTY CASH RECORD

There should be a receipt for each item listed in the Paid column.

checks and other substitutes for cash, such as cashier's checks, bank drafts, and money orders, are known as *negotiable instruments*. Even though the secretary may not be responsible for the direct handling of credit and collection instruments, she must understand the terms used in connection with them because her dictation may include references to them.

Promissory Notes. A promissory note, more commonly referred to simply as a note, is an express promise by one person, known as the *maker*, to pay a certain sum of money on demand or at a fixed or determinable future date to another person or party, known as the *payee*.


$454.00 ELIZABETH NEW JERSEY Feb 15, 195-
Three MONTHS AFTER DATE I PROMISE TO PAY TO
THE ORDER OF James Kenny
Four Hundred fifty four and No/100 DOLLARS
AT THE ELIZABETH TRUST COMPANY. ELIZABETH, N J
VALUE RECEIVED
DUE NO. 189 Samuel Jenkins

PROMISSORY NOTE

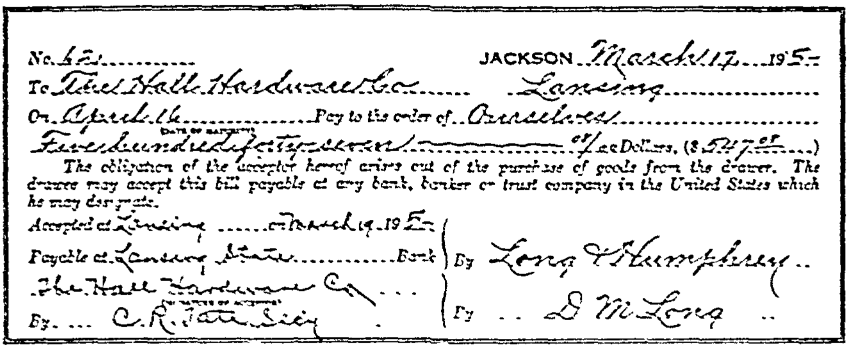
Notes are given as evidence of money borrowed or money due. Notes are also given as promises to pay past-due accounts.

Frequently collateral is requested to pledge the payment of a note. In this case the instrument is called a *collateral note.* Collateral can be salable securities, a mortgage on real estate, or anything that represents ownership and is exchangeable. When an obligation is fully paid, the collateral is returned to the borrower. If it is not paid, the creditor can convert the collateral into cash. A special collateral note form is used.

Some notes are interest-bearing. On these the interest is paid at maturity when the *face* of the note is due. If a note is non-interest-bearing, the agency making the loan deducts the interest in advance (known as the *discount*) from the face of the note. The remainder is called the *proceeds*. For instance, a borrower who give a bank a three-month, non-interest-bearing note for $1,000 would receive $985 if the discount was figured at the rate of 6 per cent.

receiver present the original copy of the bill of lading to the railroad company before obtaining possession of the merchandise. The bill of lading with the draft attached is sent to the bank in the town of the buyer. When the merchandise arrives, the purchaser pays the draft at the bank, obtains the bill of lading, and claims possession of his goods at the freight office.

Trade Acceptances. When a commercial time draft is drawn upon a customer at the time of a sale to him, the instrument is known as a *trade acceptance.*


No. 62 JACKSON March 17 195_
To The Hall Hardware Co. Lansing
On April 16 Pay to the order of Ourselves
DATE OF MATURITY
Five hundred forty-seven 05/100 Dollars ($547.05)
The obligation of the acceptor hereof arises out of the purchase of goods from the drawer. The drawee may accept this bill payable at any bank, banker or trust company in the United States which he may designate.
Accepted at Lansing March 19 195_
Payable at Lansing State Bank
The Hall Hardware Co.
By C. R. [illegible]
By Long & Humphrey
By D. M. Long

TRADE ACCEPTANCE

In the foregoing illustration, Long & Humphrey, of Jackson, Mississippi, drew a 30-day trade acceptance upon The Hall Hardware Co., of Lansing, Michigan, for the amount of merchandise sold. The Hall Hardware Co. signed (accepted) the trade acceptance and returned it to Long & Humphrey, who kept it until it was due and then presented it for payment. Sometimes the bill of lading with which to get the merchandise from the freight company is not turned over to the buyer until the trade acceptance is signed.

ENDORSEMENTS Notes, drafts, and trade acceptances, as well as checks, may be endorsed in several ways by the holder in order to pass ownership to somebody else. The types of endorsements are blank, full, restrictive, qualified, and conditional.

BANK SAFE-DEPOSIT BOXES Frequently the employer rents a safe-deposit box from his bank. This is a metal box locked by two keys into a small compartment in the bank's safe-deposit vault. The bank has very strict rules about access to safe-deposit boxes. The customer must register each time he goes to his box; a bank guard accompanies him to the box, opens one of the locks with his key, and opens the other lock with the customer's key. The box itself is then removed and taken by the customer to a private room. Ordinarily securities, wills, insurance policies, notes, gems, and other small valuable articles are protected by safe-deposit storage.

The employer must sign a special banking form if he wishes his secretary to have access to his safe-deposit box. She may have two responsibilities relative to safe-deposit box work: first, to maintain a perpetual inventory of its contents in duplicate, one copy to be kept in the box, the other in her office; and second, to guard the key carefully. Rent is usually billed annually and is deducted from the customer's checking account if he has one.

REFERENCE READINGS

KNIFFIN, W. H. *How to Use Your Bank.* New York: McGraw-Hill Book Company, Inc., 1949, 229 pp.

SCOTT, LOUISE HOLLISTER. *Income Management for Women.* New York: Harper and Brothers, 1940, pp. 109–124.

QUESTIONS ON READINGS

1. How should checks, bills, and coins be prepared for deposit?

2. What are the various ways that checks may be listed on a deposit slip?

3. Why is it not necessary to add a penwritten signature to a rubber stamp endorsement on checks that are being deposited?

4. Why should the check stub be filled in before the check is written?

5. How would you write in words the following amounts on the "Dollar" line of a check:

(a) $86.25 (b) $275.35 (c) $1,000 (d) $0.95 (e) $2,284 (f) $18

6. To prevent alteration, what precautions should be observed in writing checks?

7. What is the procedure for stopping payment on a check? Does anyone lose when payment is stopped?

8. If the secretary discovers an error on a check stub after several additional checks have been written, how should she correct the error?

9. When a bank draft is purchased, it may be drawn in favor of the person or business to whom payment is being made, or in favor of the person making the payment and endorsed by him to the creditor. Which do you think is the better method? Why?

10. Under what circumstances might the secretary use stamps in making an out-of-town remittance?

11. In what respects are a note and an accepted commercial draft alike? In what respects are they different?

12. What form of endorsement should be used in each of the following situations:

(a) When the secretary is cashing a check at the bank?

(b) When a check is deposited by mail?

(c) When the endorsed check is to be sent to someone through the mail?

DISCUSSION QUESTIONS

1. Do you think that the secretary is ever justified in borrowing for her personal use from the petty cash fund?

2. What factors should be considered in determining the amount of the petty cash fund?

3. Your predecessor followed the practice of stapling canceled checks to the invoices and bills when they were paid. The paid bills with canceled checks attached were filed in monthly folders. Do you think this would be a desirable practice for you to follow? If so, why? If not, why not?

4. Since the bank is convenient to where you eat, your employer suggests that you make the daily deposit on the way to lunch. Would you be justified in leaving early or returning late from lunch?

5. Your work has been so heavy that you have not had office time to reconcile the bank account. Would the circumstances justify your taking the checkbook, canceled checks, and bank statement home to work on the reconciliation during the evening?

PROBLEMS

1. A deposit includes the following checks, bills, and coins:

Checks

American National Bank Kalamazoo, Mich.	$124.80	Ohio National Bank Columbus, Ohio	115.25
Central Savings Bank Detroit, Mich.	16.25	Dayton Trust Company Dayton, Ohio	76.10

Bills		Coins	
Twenty-dollar bills	4	Halves	19
Ten-dollar bills	16	Quarters	62
Five-dollar bills	21	Dimes	73
One-dollar bills	155	Nickels	45
		Pennies	103

(a) Indicate how the checks should be endorsed.
(b) For each denomination of bills give (1) the number of bills that would be wrapped, (2) the value of the wrapped bills, (3) the number of unwrapped bills, (4) the value of the unwrapped bills, (5) the value of all bills of all denominations.
(c) Follow the same instructions for the coins.
(d) Determine the total amount of the deposit.
(e) Indicate specifically how the bills and coins in the deposit would be presented to the bank teller.

2. During the month of March the following checks were issued by the Alpha Radio Company:

No. 2146	$ 10.23	No. 2159	$191.84	No. 2172	$ 50.00
No. 2147	4.24	No. 2160	2.85	No. 2173	118.34
No. 2148	166.81	No. 2161	105.25	No. 2174	101.47
No. 2149	15.31	No. 2162	2.04	No. 2175	6.60
No. 2150	.52	No. 2163	254.68	No. 2176	14.67
No. 2151	18.93	No. 2164	65.00	No. 2177	219.00
No. 2152	204.68	No. 2165	27.13	No. 2178	19.00
No. 2153	22.54	No. 2166	8.50	No. 2179	178.34
No. 2154	4.31	No. 2167	85.46	No. 2180	8.14
No. 2155	16.77	No. 2168	346.06	No. 2181	125.00
No. 2156	16.10	No. 2169	46.81	No. 2182	11.12
No. 2157	18.30	No. 2170	281.69	No. 2183	1.92
No. 2158	4.06	No. 2171	5.00		

The check-stub balance on March 1 was $932.15. The deposits for the month totaled $2,530.15.

The bank statement for the month of March showed a balance of $980.69 on March 31. A service charge of $1.50 had been deducted. All of the checks written were returned with the bank statement with the exception of checks Nos. 2173, 2179, and 2183.

Prepare the reconciliation of the bank statement.

PROJECTS

A. Preparing Deposit Slips. Prepare duplicate deposit slips, listing the checks, bills, and coins given in Problem 1 to the account of Continental Products. Use the current date.

B. Writing Checks. Assume that you are employed in the branch office of Continental Products located in your community.

Write the following checks. Use the current date. Sign the checks with your own name. If possible, type the checks.

Checkbook Balance: $4,851.25

Check No. 1000, to the gas company for $5, for connecting the gas meter.

Check No. 1001, to the Reliable Plumbing Company, for $100, for repairs.

Check No. 1002, to the water company for $15, for the water assessment for the year.

Check No. 1003, to Miss Julia Blackburn, for $50.50, for special decorating services.

Check No. 1004, to the light company, for $6.50, for the electric bill.

Check No. 1005, to the National Building and Loan Association, of Chicago, for $2,070.85, payment on a loan.

Check No. 1006, to the telephone company, for $3.50, for a telephone connection.

Check No. 1007, to Mrs. Elsa Hill, for 75 cents, our contribution to a benefit.

C. Keeping a Petty Cash Record. Your office had the following petty cash transactions during the month of May:

May 1. Cash on hand, $10.
3. Paid 15¢ for insuring a parcel-post package.
4. Paid the Modern Office Supply Company $2.26 for miscellaneous office supplies.
8. Purchased flowers for the bookkeeper, $2.50.
10. Paid postage due, 3¢.
12. Purchased a bottle of ink, 15¢, and a diary for Mr. Robert L. Simpson, 75¢.
16. Purchased stamps, $3.
17. Cashed a check for $8.84 to reimburse the petty cash fund.
19. Paid $4 for having the windows washed.
21. Paid postage due, 6¢.
24. Paid $1.25 for express charges on merchandise returned.
26. Paid $2.50 for typewriter repairs.
29. Paid 50¢ for a duplicate office key.
31. Cashed a check to bring the balance of the petty cash fund up to $10.

(a) Rule a simple petty cash record form similar to that illustrated on page 399.

(b) Record the petty cash transactions. Rule and balance the book, and carry forward the balance each time that the fund is renewed. Prepare the petty cash report on May 17 and on May 31.

CHAPTER 20

INVESTMENT AND INSURANCE DETAILS

AS a secretary, you will need to know about investments and insurance because your employer will probably own securities and real estate and will undoubtedly carry insurance to provide protection for his family and his business. To perform your assigned duties connected with investments and insurance, you should be familiar with the various kinds of investments, the routine of buying and selling securities, and the kinds of insurance.

SECURITIES

Stocks and bonds are known as securities. Stocks are evidences of *ownership* in a company, and bonds are evidences of *creditorship.*

Securities are usually purchased for one of two reasons. First, securities are purchased as an investment, that is, to secure a *yield* or return in the form of dividends or interest. The return on a stock is the income received from that stock in dividends, usually paid at periodic intervals during the year. The yield on bonds is the annual or semiannual interest received on them. Second, securities may be purchased as a speculation. The buyer hopes to sell them at a profit. In either case, the secretary must keep accurate, complete records. When the employer speculates in securities, furthermore, the records must be kept up to date, in fact, almost up to the hour so that they are ready for his perusal at any time.

STOCKS

Ownership in a corporation is divided into units known as shares of stock, which, taken as a total, represent the capital stock of the business. A stockholder is an owner of one or more shares of capital stock, and his ownership is evidenced by a certificate known as a *stock certificate.* When stocks are bought and sold, it is the certificates that change hands.

A stock certificate represents a contract between the holder and the corporation that issues it. This contract may provide any arrangements of rights and liabilities not prohibited by law. The stockholder is generally granted the following privileges: (1) To have one vote in stockholders' meetings for each share held. The business of the stockholders' meeting is generally confined to the election of directors, the enactment of bylaws, and the passing upon the sale or mortgage of the entire assets of the corporation. (2) To participate proportionately in the profits whenever the directors vote to declare dividends out of such profits. (3) To transfer his shares freely.

Since these privileges may be limited or varied, and since additional privileges may be granted in any stock contract, various classifications of stock are created.

Kinds of Stocks. Stocks fall into two general classes, *common* and *preferred.* Holders of common stock are usually the only ones who have the right to vote in the stockholders' meetings. The rate of dividends paid on common stock is not fixed. The payment of dividends is at the discretion of the board of directors of the company and is decided upon by them if income is available after the payment of bond interest and preferred stock dividends.

Preferred stock has a fixed dividend rate and has a preference over common stock in the sense that dividends are paid on it before they are paid on common stock. Preferred stock may be *cumulative* or *noncumulative.* When the stock is cumulative, any dividends on preferred stock that are not paid accumulate and must be paid before any distribution can be made to common stockholders. Noncumulative preferred stock does not contain a provision to pay dividends in arrears.

Preferred stock also may be *participating* or *nonparticipating.* It is participating only if the stockholder is entitled to share with the common stockholders in any additional dividend disbursement after an agreed rate is paid on the common stock.

Stocks are also classified as *par-value* and *no-par-value* stocks. When a definite value is given to each share of stock and is printed on the stock certificate, that amount is known as the *par value* and the stock, as par-value stock. In many cases

stock has a par value of $100 a share. If the value of each share of stock is not stated on the certificate, the stock is known as no-par-value stock. In most states no-par-value stock cannot be issued for less than $5 a share. Par-value stock is usually issued at its face value. After either type of stock has been issued, the value at which a share of stock is sold may be higher or lower than its value at the time of issuance, depending upon a number of factors that determine the demand for that stock.

Stockholders' Meetings. Stockholders' meetings are usually held annually. Members of the board of directors are elected at this meeting by the stockholders present in person or by proxy. The board, in turn, elects the officers of the company at one of its regular meetings. The business to be taken up at the annual meeting of stockholders must be included in the proxy statement. Usually the only business is the election of directors.

A notice of the meeting, accompanied by a proxy form and a proxy statement, is sent to each stockholder entitled to vote. A *proxy* is a legal instrument assigning one's voting privilege to a specified person or persons. The management matter-of-factly hopes that the stockholder will sign the printed proxy form, for

PROXY

Know All Men by These Presents, That I, Jefferson Coleman of Tyler, Texas, hereby delegate and appoint Steven Ames, to be my substitute, agent, and attorney for me, and in my name and behalf, to vote at the election of directors or other officers, and at any meeting of the stockholders of the THE SOUTHWEST MANUFACTURING COMPANY as fully as I might or could do if personally present and acting in my own behalf.

In Witness Whereof, I have hereunto set my hand and seal this fourth day of October, 195_.

Witness,

J. J. McCormick

Thomas Harvey

Jefferson Coleman

PROXY

A proxy is generally executed on a specially prepared form similar to this illustration.

it gives the voting power to one who is in sympathy with the management. If the stockholder does not plan to attend the meeting, he may or may not sign and send in the proxy form. The secretary to a stockholder should try to mail the proxy on time but, if the employer appears reluctant or seems set on procrastination, it is better not to annoy him with repeated reminders about the proxy.

If the employer plans to attend the annual meeting of stockholders, the secretary must make calendar notes of the date, the place, and the time.

Securities and Exchange Commission. The Securities and Exchange Commission, commonly referred to as the *SEC*, is a Federal agency set up to protect the investing public. In the pre-SEC days an unscrupulous management could withhold vital facts from stockholders or present them in such a way as to mislead. The SEC insists upon the true and full divulgence of the management policies and the financial situation to the stockholders.

Secretaries to directors and officers of corporations send numerous reports to the SEC. An officer or director is required to file a report monthly with the SEC, setting forth any changes in his holdings of that company's stock. A second form requires an officer or director to report on ownership of company securities newly registered within the month; a third form reporting ownership of company stock must be filed within ten days after a director is appointed. Copies of these reports must also be sent to each exchange on which the security is listed.

Each candidate for directorship—even for re-election—is required to answer a questionnaire from the company. This information is then published in the proxy statement, which is sent to each stockholder entitled to vote. It is divulged for the protection of the stockholders—to prevent control of the company from falling into the hands of a group of manipulators who might manage it and speculate in the stock to their personal advantage instead of that of the stockholders.

The secretary to a director obviously has a high responsibility regarding his records of financial activities. An employer may be a director in several companies. Questionnaires and SEC reports must be filed for each office held. The secretary's

records must be precise and complete if for no other reason than that she will be able to fill out the required forms.

Annual Reports. Most companies send reports at least annually to registered holders of voting stock. Such a report usually contains a president's letter, setting forth the activities of the company, and the financial statements—the balance sheet, the profit and loss statement, and the surplus statement.

Some employers study these reports carefully and then have them filed. If this is your employer's habit, file them with other such reports or in the separate folder for that stock. Keep them available for reference. It would probably be better to keep all such reports in the active files because they are more accessible there should the employer wish to compare a current report with preceding ones.

BONDS

A bond is a certificate containing a written interest-bearing promise to pay a definite sum of money at a specified time and place. It is evidence of money loaned to the issuer of the bond. The interest due must be paid to bondholders before stockholders can share in the earnings of the company, and for that reason bonds are considered safer investments than stocks. The ownership of bonds does not give the investor voting rights in the company.

Kinds of Bonds. There are two general classes of bonds, coupon bonds and registered bonds. *Coupon bonds* are payable to the person holding them. If the bond or the interest coupons are lost or stolen, they may be converted into cash by the holder. Coupon bonds, therefore, present a real responsibility to the secretary who is entrusted to care for them. Bonds of this type should be kept in a safe-deposit box.

Coupons are cut from the bonds on or after their due date and presented at a local bank for collection. Most banks make a slight charge for this collection service since they must mail the coupon to the bank that is redeeming the coupons for the issuer. Bond coupons can be listed on a bank deposit slip.

Registered bonds are decidedly less worry to the secretary. Such bonds are registered by the issuing corporation, which mails the interest to the registered holders. If the bond is lost, the owner still receives his interest and principal payments.

Bonds may also be classified in the following ways:

1. According to the issuer. For example, *government bonds* are issued by the U. S. government; *municipal bonds*, by municipalities; *state bonds*, by states; *foreign bonds*, by foreign countries; and *public utility bonds*, by public utility companies such as gas, light, power, or water companies. "Municipals" in investment parlance, however, means those bonds issued by all political subdivisions—states, counties, school districts, etc.

2. According to the purpose for which they are issued, such as *park bonds*, *library bonds*, etc.

3. According to term or method of retirement. *Short-term bonds* are issued for short periods of time; *callable bonds* may be called in before maturity; *serial bonds* mature at different specified dates.

4. According to their security. *Mortgage bonds* are secured by mortgages on properties; *real-estate bonds*, by mortgages on real estate; *collateral bonds*, by collateral deposited with a trustee. *Debenture bonds*, sometimes simply called debentures, have no specific assets behind them; they are secured by the credit of the issuer.

STOCK MARKET TRADING

Trading in the stock market, that is, the buying and selling of stocks and bonds in the open market, is handled through a broker. Stock certificates sold through brokers are not passed from owner to owner; the seller turns in his certificates to the broker who sends them to the transfer agent for cancellation. The transfer agent employed by the corporation is usually a bank, which, for a fee, keeps a record of the specific owners of stock certificates by names and numbers. The agent fills in a new certificate with the name supplied to him, writes in the number of shares the certificate represents, has it signed and countersigned, and forwards it to the broker for delivery to the new owner.

A Brokerage Transaction. To understand the procedure of a brokerage transaction, let us follow through on a hypothetical one in which the secretary shares responsibility. Mr. Seeley places an order with his broker to buy twenty-five shares of U. S. Steel, common. Mr. Seeley's secretary makes a full memorandum of the order: the date, the time, and the order

placed. This is placed in a pending file. When the purchase has been made, the broker sends the customer an invoice, called a *confirmation*, for the purchase of the stock. The secretary compares the confirmation with the memorandum of the order. The employer must send the check to the broker with an order for the transfer of the stock. The broker then arranges for the transfer of the stock to the customer. Finally, the secretary makes a record of the numbers of the certificates and notes them on the confirmation. She transfers all of the information from the confirmation to the employer's permanent records.

The invoice or bill for the purchase or sale of securities is called a confirmation because the broker is acting as an agent, and he confirms by means of the invoice the instructions given him. Since the income from most securities and the profit or the loss resulting from the sale of securities must be reported on income tax returns, confirmations should be saved as essential source records. For income tax purposes, confirmations are proof of the prices paid and the prices at which the securities were sold.

The secretary may attach the confirmation to the stock certificate, or she may file the confirmations chronologically under the broker's name so that they will be available when tax reports are prepared. Confirmations are not transferred to inactive files until the securities are sold and reported on a tax return. The inactive confirmations may be filed with the employer's copy of his income tax return for the year in which the capital gain or loss was taken.

Monthly Statements. The broker sends out a monthly statement if the account is open or if there is a credit balance. The statement should be checked with the employer's records, and discrepancies should be cleared up. These statements should also be retained because they may be useful in making out tax returns.

Keeping Personal Records of Securities. One good rule for the secretary to follow in keeping financial records for securities is to use a separate page or card for each lot. If the employer buys twenty-five shares of U. S. Steel common this month, twenty-five more two months from now, and fifty more next year, each lot should be recorded on a separate form, because

Know all men by these presents:

That Joseph Bentley and Marie Bentley, his wife
in consideration of One thousand dollars ($1,000)
to them *paid by* Walter Rathburn
the receipt whereof is hereby acknowledged, do ______ *hereby* **Grant, Bargain, Sell and Convey** *to the said* Walter Rathburn, his *heirs and assigns forever:)*
Lot sixteen (16) block three (3) in the Avonlea subdivision
and all the **Estate, Title and Interest** *of the said* Grantors
either in Law or Equity, of, in and to the said premises; **Together** *with all the privileges and appurtenances to the same belonging, and all the rents, issues and profits thereof;*
To have and to hold *the same to the only proper use of the said* Grantee
his *heirs and assigns forever.*

And the said Joseph Bentley and Marie Bentley
for themselves *and* their *heirs, executors and administrators, do* ___ *hereby* **Covenant** *with the said* Walter Rathburn, his *heirs and assigns, that* they are *the true and lawful owner*s *of the said premises, and ha*ve *full power to convey the same; and that the title so conveyed is* **Clear, Free and Unincumbered; And further,** *That* they *do* ___ **Warrant and Will Defend** *the same against all claim or claims, of all persons whomsoever;*

In Witness Whereof, *The said* Joseph Bentley and Marie Bentley
who hereby release ___ *all* their *right and expectancy of* **Dower** *in the said premises, ha*ve *hereunto set* their *hand*s ______ *this*
fourteenth *day of* October *in the year of our Lord one thousand nine hundred* fifty.

Signed and acknowledged in presence of—

P. M. Davies

E. R. Hall

Joseph Bentley

Marie Bentley

State of Virginia**, County of** Norfolk**, ss.**

Be it Remembered, *That on this* fourteenth *day of* October *in the year of our Lord one thousand nine hundred* and fifty *before me, the subscriber, a* Notary Public *in and for said county, personally came* Joseph Bentley and Marie Bentley
the grantors in the foregoing Deed, and acknowledged the signing thereof to be their *voluntary act and deed.*

In Testimony Whereof, *I have hereunto subscribed my name and affixed my* official *seal on the day and year last aforesaid.*

E. R. Stern

Notary Public.

WARRANTY DEED

Know all men by these presents:

That Thomas Timmons, of Montgomery County, Ohio
in consideration of One Thousand (1,000) Dollars
to him paid by Peter Sterling
the receipt whereof is hereby acknowledged, does hereby **Grant, Bargain, Sell and Convey** to the said Peter Sterling, his heirs, and assigns forever,
Lot thirty-two (32) block six (6) in Oxford Park, an addition in Dayton, Ohio, as per recorded plat thereof.
and all the **Estate, Title and Interest** of the said grantor either in Law or Equity, of, in and to the said premises; **Together** with all the privileges and appurtenances to the same belonging, and all the rents, issues and profits thereof; **To have and to hold** the same to the only proper use of the said grantee his heirs, ~~xxxxxxx~~ and assigns forever.

And the said Thomas Timmons for himself and his heirs, executors and administrators, ~~xxxxxxx~~ does hereby **Covenant** with the said Peter Sterling his heirs, ~~xxxxxxx~~ and assigns, that he is the true and lawful owner of the said premises, and has full power to convey the same; and that the title so conveyed is **Clear, Free and Unincumbered; And further,** That he does **Warrant and Will Defend** the same against all claim or claims, of all persons whomsoever; **Provided, Nevertheless,** That if the said Thomas Timmons shall well and truly pay or cause to be paid, his certain promissory note of even date herewith, for One Thousand (1,000.00) Dollars drawn to the order of Peter Sterling and payable in three years from date, with interest at six (6) per cent per annum then this mortgage shall be void.

In Witness Whereof, The said Thomas Timmons has hereunto set his hand this twenty-second day of August in the year of our Lord one thousand nine hundred and fifty.

Signed and acknowledged in presence of
C. W. Carter
L. D. Krehbiel

Thomas Timmons

REAL-ESTATE MORTGAGE

SAFEKEEPING OF REAL-ESTATE DOCUMENTS Deeds and mortgages are usually kept in a bank safe-deposit box or a fireproof office vault or safe. Usually all records are stored in the business vault overnight, safe from fire and tampering. Money, valuable papers, and the most important or confidential records may be kept in an office safe. The doors of both vaults and safes have combination locks, which can be opened only by those persons knowing the set of numbers making up the combination. Real-estate papers can be kept in a file cabinet, but there is a chance for loss or theft if they are.

PROPERTY RECORDS Permanent records of property owned are kept for several reasons: to determine the value of the property, to show the outstanding debt, to use in tax reporting, and to use as a basis for setting a satisfactory selling price. The records are set up so that they can be used over a period of years.

A separate record should be kept for each piece of property owned. The record should include the following items of information:

Location
Description
Date of acquisition
Recording data (name of county and state, number of deed book, page number)
Total initial cost (land, buildings, permits, fees, etc.)
Mortgage data (amount, date, interest and principal payments)
Location of pertinent papers
Expenses
Income
Date of sale (date, terms, profit or loss)

The location and the description items and the date of acquisition are taken from the face of the deed. The recording data are taken from the recorder's stamp. The total initial cost is computed by itemizing the purchase price of the land and the building, the fees, and all other expenses incident to the purchase. The mortgage data are taken from the document. It is very important to list where the papers have been filed so that if the employer should suddenly die, the whereabouts of his papers could easily be determined from such records.

Expense items for the office record include all expenditures on the property for repairs, decorating, insurance, taxes, etc. These are listed so that the total costs for each year can be determined. Income items are the various rents received for apartments, offices, garages, rooms, and so on.

RENTING PROPERTY If the employer is a tenant, he may be required to sign a *lease*, that is, to execute a formal contract for the use of the property at a stipulated rent. A lease may mean a great deal—or little. It may state that the tenant is to occupy the property for a definite period, or that he is a *tenant-at-will*, meaning he can terminate the lease at any time. The articles in a lease should be read carefully to make sure that the tenant is aware of all of the conditions.

The secretary's responsibilities are considerably lessened when the employer rents rather than owns his business property. She sees that the monthly rent check is sent out on time; she may talk with the landlord or the manager of the building occasionally about needed repairs or decoration. It is hardly necessary to set up special record forms, because the check stubs and canceled checks provide sufficient record.

CONTRACTING TO BUILD When the employer is building or remodeling, either for personal or business reasons, the secretary can be of real help by keeping expense records on the contracts. There are many details that the employer must handle, and the expense records are those that are frequently delegated to the secretary.

When an architect is employed, he carries the burden of keeping the expenditures within the contract and tells the owner when and how much to pay to the contractors. The architect agrees to draw satisfactory plans and specifications, to receive bids for the owner, to superintend the construction, making sure the specifications are followed as to the quality of material and workmanship, and to notify the owner about payments to contractors. His fee is a percentage of the total building contracts. Separate contracts are made with the plumber, the electrician, the excavator, and so on. The signed contracts are binding legal documents and should be filed in a safe place.

other owners, for which service he receives a fee. Managing property means negotiating with the tenants, keeping the building in repair, and handling certain of the finances—collecting rentals, paying expenses, and so on. Office and apartment buildings usually require the services of a manager.

Tenants may be required to sign leases, which the secretary will prepare. Printed lease forms are obtainable in stationery or legal supply stores. The pertinent facts must be filled in on the form and the signatures affixed. These forms should be checked with an attorney to be certain they set forth the exact conditions desired. The secretary keeps full detailed records of expenses, since all of them are deductible on income tax returns, and full detailed records of income, since all of it must be reported.

It is best ordinarily to set up a file for each unit of rental, such as each suite of offices, each apartment in a building, or each house. An alphabetic index of tenants' names, giving their rental location, serves as a helpful cross reference. Each individual file should contain everything pertaining to the unit of rental, such as correspondence, the lease, bills for repairs, or improvements. A miscellaneous file should be assigned to the building in general to take care of the items that cannot be charged to a specific rental unit, such as janitor service, repairs to the exterior of the building, or corridors.

The records can be written right on the file folder, or on a card or sheet filed inside. Preferably, they are kept on separate sheets in a loose-leaf book where the chance of their being lost is considerably reduced.

The records include all data about the original cost of the property, the expenses, such as repairs, improvements, taxes, insurance, decorating, etc., and the itemized income.

The secretary needs to exercise tact in her tenant relationships. If she does the collecting, she must be diplomacy itself when suggesting that Mr. Slowpay has undoubtedly overlooked paying the rent this month. She might catalog points about each tenant—with whom to talk, what approach to use, etc.

The banking of money collected from investment property and the payment of bills for such property should be handled carefully. It is extremely important that the deposit slips be completed so that every deposit can be identified and that

every check stub be labeled so that it can be charged against a specific rental unit or building.

Insurance

Insurance can be grouped into two general classes—personal and property. Personal insurance includes the many kinds of life insurance; property insurance covers loss from impairment or destruction of property, such as fire, earthquake, burglary, and automobile insurance.

Some insurance is purchased solely for protection. It insures for a specified time and terminates on a stipulated date. When a policy expires, new coverage must be purchased. Fire insurance, collision insurance, and so on, are protection coverage. Almost all life insurance, on the other hand, is in force until the death of the insured. In addition to protection, it constitutes a form of saving because a cash value, called the *cash surrender value*, accrues.

The secretary has two responsibilities regarding the employer's insurance; namely, *to see that the premiums are paid* promptly so that there will be no lapse in protection for the employer, and that summary records are kept on each kind of insurance for the employer's information.

PREMIUM PAYMENTS AND RENEWALS When a secretary begins working with a new employer, she will know nothing of his personal insurance commitments, and he probably will not take time to explain them to her. If she is lucky, she may inherit from the previous secretary an analytical and summary record. She will more likely have to set up this record herself from the *notices of premiums due* as they are received.

Premium is an insurance term meaning the amount paid periodically for a policy. Premiums are payable in advance. Those on property insurance are usually paid annually or for a term of three or five years. Premiums on life insurance may be paid annually or in installments, weekly, monthly, quarterly, semiannually. The date of payment should be posted from the premium notice to the secretary's calendar. It takes at least a year to complete the insurance records from premium notices.

Many premium notices on life insurance policies allow a thirty-one-day grace period. If the premium is due and pay-

TYPES OF INSURANCE

FIRE (with hail, windstorm, and lightning amendments)	(a) Destruction of property (b) Use and occupancy (loss of rent) (c) Profits (loss of profits while inoperative) (d) Water damage (loss suffered from sprinklers)
CASUALTY	(a) Automobile (personal, property, and collision) (b) Burglary and theft (c) Public liability (contractors, building owners) (d) Workmen's compensation (e) Accidents (f) Plate-glass (store windows)
CREDIT, FIDELITY, AND SURETY	(a) Credit (losses from bad accounts) (b) Title (c) Employee and official bonds
MARINE	(a) Sinking, standing, burning, collision (b) Piracy, mutiny, barratry
LIFE	(a) Term (b) Ordinary life (c) Limited payment life (d) Endowment

able August 16, payment of the premium is usually made shortly before September 16. Some notices specify the grace period. On those that do not, the secretary might inquire of the employer if he knows whether a grace period is allowed or, if the notice comes from a local agency, she can telephone for that information. If the secretary should discover that a premium has not been paid after the grace period has expired, she should tell the employer at once.

The employer's property insurance, which is in force for only a specified term, is usually renewed. The local agency sends a bill on the renewal policy prior to the expiration date

of the old policy. The secretary should get the employer's approval on the renewal and then send the check for the premium. It is definitely a secretarial responsibility not to let any insurance policy lapse.

INSURANCE RECORDS From the information listed on the premium notice for a life insurance policy, the following facts can usually be determined: the name of the insurance company, the name of the insured, the policy number, the amount of premium, how often payable, and present due date. *These data are sufficient for the records the secretary should keep.* If the employer wishes the secretary to know the amount of his policies, the kinds of life insurance they represent, and the beneficiaries, he will tell her, and she can then include that information in the records.

Premium notices for property insurance may give very sketchy information or comparatively full data. Usually such

LIFE INSURANCE PREMIUM RECORD

Company	Policy No.	Amount of Premium	Payable	Due Dates
Pacific Mutual	1222476	$ 76.65	Annually	Jan. 17
Massachusetts Mutual	1120857	213.61	Quarterly	Aug. 24 Nov. 24 Feb. 24 May 24
Prudential	1034094	126.44	Quarterly	June 9 Sept. 9 Dec. 9 Mar. 9

LIFE INSURANCE RECORD

This record provides a ready source of information on premium payment dates and amounts. In event of death it would provide a record of the life insurance carried by the employer.

notices are sent out on the agency's billhead. The full data can be taken from the new policy when it is delivered. Usually one record is set up for each kind of property insurance in such a form that it can be used over a period of years. For instance, data from a new fire insurance policy are posted to the fire insurance record. When that policy expires, data from the renewal policy are posted to the same record.

Property insurance records should include these items of information:

The name of the company issuing the insurance
The agency selling the insurance to the employer
The description of the coverage
The policy number
Effective date of policy
Date and amount of premiums
Expiration date of policy
Location of policy

Some insurance costs, such as fire, earthquake, and tornado insurance on property rented to others, are deductible items on income tax returns. Insurance on an automobile necessary to the conduct of a business is deductible.

Fire and life insurance policies should be kept in the employer's safe-deposit box, office safe, or home safe. In event of a fire, if the policies were kept in the office, they might be destroyed along with the insurance records; thus, all records of the insurance would be lost. If the policies are to be retained in the office, a record of each policy should be given to the employer to keep in his home or elsewhere.

Expiration Date:	January 4, 1952
Type of Insurance:	Fire on Office Furniture
Amount:	$5,000
Company:	Mutual Insurance Company
Policy No.:	X126834
Date of Issue:	January 5, 1949
Premium:	$18.20
Time:	Three Years

INSURANCE INDEX CARD

Some secretaries find it convenient to prepare an index card for each insurance policy. The index card is filed in a tickler file according to expiration date or premium payment date. Thus the card provides a record of the insurance and also serves as a reminder notice for renewals and premium payments.

SPECIAL KINDS OF EMPLOYEE INSURANCE

Many companies offer *group insurance* to their employees. This is a form of life insurance in which every employee may share. Its advantages are that one does not have to pass a medical examination—every employee is usually eligible regardless of age or physical condition—and that the amount of the insurance payable at death is quite high in proportion to the premium paid. Frequently the company pays a part of the premium cost for the employee, and his part is deducted from his salary.

Hospital care insurance is offered through some company organizations. It provides for payment for a stipulated number of days of hospital care and other hospital costs. The entire family of the employee may be covered by one policy and the payment of one premium. Records of employee insurance are ordinarily handled by a special department. The secretary's interest in this kind of insurance is mostly personal, because she can participate in this type of protection.

FIDELITY BONDS

A *fidelity bond* is insurance on an employee's honesty. Most employers carry such insurance on those employees who handle money. The company to which application is made for a fidelity bond investigates the employee's character and the supervisory and control methods extant in the employer's business. No bond is sold if the applicant's character is found wanting or if the situation is such that it would be easy to embezzle funds from the employer.

Blanket fidelity bonds covering the entire personnel are bought by banks and other financial institutions. They protect against losses by embezzlement, robbery, forgery, and so on.

To be asked to take out a fidelity bond is no reflection on your character. Actually it indicates that you are considered competent to be entrusted with company funds.

DUE-DATE FILE

Keeping track of due dates of both receivable and payable items is a very important responsibility. During her first year with her employer, the secretary can gather complete information regarding due dates and amounts covering every one of his financial activities. She can learn and record the due dates and amounts

of his *receivables*—bond interest, stock dividends, rents, interest and principal payments on mortgages or notes receivable; likewise, she can learn and record the due dates and amounts of all of his *payables*—rents, interest and principal payments on mortgages payable and notes payable, insurance premiums, and the dates of taxes; she can show the expiration dates of insurance policies, the dates of those bonds reaching maturity, and the dates of the final payments on indebtedness such as mortgages or notes.

The secretary may record this financial information in an annual due-date calendar. A block form using one column for each month, 31 lines deep—a line for each day—is easy to set up and keep. When prepared in this form, the employer's commitments for the year and for each month are visualized.

Another method by which the secretary might keep track of due dates is to prepare a card similar to that illustrated on page 427 for each receivable and payable item. The cards then could be filed according to due dates in a tickler file. The advantage of the card method is that the cards can be readily transferred from month to month, or year to year, without rewriting the information.

Records of financial information of this kind are naturally very confidential. In the event of the employer's death, such records would be of great help to the executor of the estate.

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3. If an employer engages in many stock-market transactions and the secretary is responsible for keeping his personal financial records, what advantage is it for her to study the stock-market quotations in the daily newspaper?

4. Assume that you keep the records of your employer's personal financial investments. In the event of your employer's death, would you volunteer to turn these records over to his widow or would you wait until the executor of the estate requested them?

5. It is your responsibility to pay insurance premiums on your employer's policies as they come due. Assume that you forgot to make a payment on one of his policies. This omission comes to your attention when a letter in the incoming mail points out the delinquency and encloses a form your employer must sign to have his policy reinstated. How would you handle this situation?

PROBLEMS

1. When you obtain employment as a secretary, you may have the opportunity to participate in some form of employee group insurance maintained by your employing company. In order that you may know something about these arrangements and how they operate, investigate the employee insurance plan maintained by some company and report to the class the details of the plan.

2. Your employer has investments in a large number of stocks and bonds. It is your responsibility to keep a record of these investments. Draw up a form or forms that you might use to record these investments; demonstrate by entries how the form or forms would be used.

PROJECTS

A. Property Records. Your employer, Robert L. Simpson, owns the two pieces of property described below. Type a summary of the information that should appear on the record for each property for the current year.

(1) His home at 219 Kenwood Drive. Total cost, $19,800; semiannual real-estate taxes of $160 are due June 15 and December 15. He has the home mortgaged and makes a payment of $100 on the 13th of each month.

(2) A four-apartment building at 17 Avenore Drive. He owns the building outright, having paid $38,500 for it. The rentals are as follows:

Apartment 1—$75.00 due on the 8th of the month
Apartment 2—$70.00 due on the 27th of the month
Apartment 3—$60.00 due on the 21st of the month
Apartment 4—$52.50 due on the 11th of the month

CHAPTER 21

EMPLOYEE AND PAYROLL RECORDS

THE secretary in a small office frequently handles the payroll work—keeping time records, computing earnings and deductions, and arranging for the payments of salaries and wages. These duties have become more complex with the enactment of legislation pertaining to social security benefits, wages and hours, and income taxes.

Employee and Payroll Legislation

To handle the payroll work in a small office, it is necessary to be familiar with and know how to handle certain special forms and reports that are required by the Federal Social Security Act, the Fair Labor Standards Act, the current income tax law, and the state unemployment compensation acts.

Form SS-5
TREASURY DEPARTMENT
INTERNAL REVENUE SERVICE

APPLICATION FOR SOCIAL SECURITY ACCOUNT NUMBER
REQUIRED UNDER THE FEDERAL INSURANCE CONTRIBUTIONS ACT
READ INSTRUCTIONS ON BACK BEFORE FILLING IN FORM

DO NOT WRITE IN THE ABOVE SPACE

1 Marilyn Jane Moore
2 536 Oak Street, Ludlow, Ky.
3 Marilyn Jane Moore
4 20
5 June 6 1928
6 Hamilton Butler Ohio
7 James William Moore
8 Catherine Lena Hardung
9 Male ☐ Female ☒
10 White ☒ Negro ☐ Other ☐
11 Yes ☐ No ☒ Don't know ☐
12 Colston & Myers
201 Fifth St., Cincinnati, Ohio
13 March 2, 1949
14 Marilyn Jane Moore

RETURN COMPLETED APPLICATION TO NEAREST SOCIAL SECURITY ADMINISTRATION FIELD OFFICE

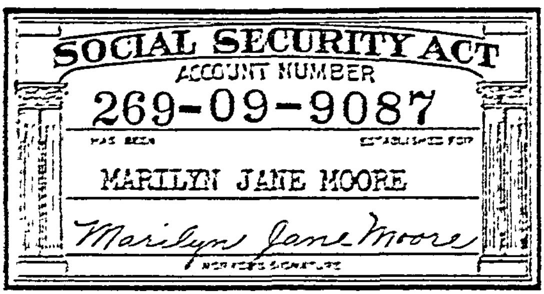
FORM SS-5, APPLICATION FOR SOCIAL SECURITY ACCOUNT NUMBER

Instructions for filling in the information are printed on the back of the form.

SOCIAL SECURITY PROVISIONS

By the provisions of the Social Security Act the Government provides to most business employees a certainty of income in old age and assures some income during times of unemployment. The first is guaranteed by the payment of old-age insurance benefits (O.A.B.) by the Federal Government; the second, by unemployment compensation (U.C.) paid by the state. The money needed to pay the benefits and the compensation is provided by taxes paid by the employer and the employee, or by the employer alone.

Social Security Numbers. Each employee must have a social security account number to identify himself in the Government records. There are actually hundreds of John Smiths in the country and frequently numerous ones in the same city. The account number is the only method of unquestioned identification in the records. To obtain a number, the employee files an application on Form SS-5. These blanks are obtained from the nearest Social Security Board Field Office, the address of which can be obtained from the local post office.



SOCIAL SECURITY CARD

Your social security card shows your account number. Throughout life you will have the same number. You will need this card when you change positions or when you or your family file a claim for benefits. Job application forms and income tax blanks ask you to list your social security number.

The filled-in blank is taken or mailed to the nearest Field Office and the employee receives a card stamped with his account number. If an employee loses his social security card, he should apply to the nearest Field Office for a duplicate. When an employee's name is changed through marriage, or if incorrect data were put on the application form, the change should be reported on a special form.

The employer also must have an identification number. To secure it, he files application Form SS-4 in duplicate. An account number always refers to an employee; an identification number, to an employer.

The secretary's responsibilities concerning social security numbers may be (1) to keep a permanent record of the numbers of all employees, and (2) to keep a supply of social security forms on hand for the use of employees.

Taxes for Old-Age Insurance Purposes. The Social Security Act provides that both the employer and the employee pay old-age benefit taxes, at the same rate, on the total earnings of the employee not exceeding $3,000. The employee does not pay his tax direct. The employer deducts the employee's tax from his earnings each time he is paid. The employer accumulates these deductions and forwards them to the Collector of Internal Revenue, together with his own tax payment, by the end of the month following each calendar quarter.

To illustrate, assume that an employee earns $40 a week and is paid at the end of each week. At a 1½ per cent tax rate* the employer would deduct from the earnings 60 cents for the employee's portion of the tax. The employer would also contribute 60 cents. At the end of the quarter (thirteen weeks), he would remit to the government $15.60 for the taxes on both the employee and the employer.

Receipts for Employees. The employer is required to furnish the employee with a receipt for social security tax deductions.

The receipt may be furnished to the employee with each wage payment, quarterly, or annually. Other payroll deductions are frequently itemized on the same slip.

Only one copy of a receipt needs to be made, because the employer is not required to keep a copy. The employee should file the copy he receives from the employer because it is his record of taxes paid, which he may need later in computing benefits accruing to him.

Unemployment Compensation. The Social Security Act encouraged the states to enact legislation for the payment of

*The rate may be increased by Congress.

purposes. The contributions to the Federal fund are allocated by the Federal Government to the various states for the purpose of administering the state unemployment compensation funds.

WITHHOLDING PROVISIONS OF INCOME TAX LAW

The Federal Government requires most business employers to withhold or deduct from each wage payment to an employee a certain amount, which must be paid by the employer to the Government for income tax purposes. The term *wages* as used in this connection includes the total compensation paid for services, such as wages, salaries, commissions, bonuses, and vacation allowances.

The amount of income tax to be withheld depends upon the wages received and the number of personal exemptions to which the taxpayer is entitled. Each employee must file with his employer, immediately upon reporting to work, a Withholding Exemption Certificate (Form W-4). This form indicates the number of personal exemptions to which he is entitled. The amount of tax withheld is then computed from a special table provided by the Treasury Department.

SOME PAYROLL FORMS YOU WILL NEED

FORM SS-1A*	Employer's Social Security Tax Return
FORM SS-5	Application for Social Security Account Number
FORM W-1*	Employer's Quarterly Return for Income Taxes Withheld
FORM W-2	Employee's Receipt for Income Taxes Withheld
FORM W-3	Reconciliation of Quarterly Returns
FORM W-4	Withholding Exemption Certificates

Instructions for filling in each form are listed in detail on each form. Read these instructions carefully. Fill in all items. Forms are available from your office of the Collector of Internal Revenue or from your post office. KEEP A SUPPLY ON HAND.

*Combined into one form, January 1, 1950.

FAIR LABOR STANDARDS ACT Any business that sells its wares or services outside of the state in which it is located must adhere to the Federal Fair Labor Standards Act regulating wages and hours—frequently referred to as the Wages and Hours Law. This legislation requires that each employer keep a record of the hours worked by each employee and that each employee must be paid at a rate at least 50 per cent greater than his regular hourly rate for all time over forty hours during a work week. These provisions affect practically all hourly and salaried employees with the exception of those holding executive positions.

The act does not require the filing of overtime reports to any governmental office, but it does require that records be kept on file for four years in the employer's office on nonexempt employees for the perusal of a government examiner at any time he chooses to look over them. Detailed information about this legislation may be obtained from the nearest office of the Wages and Hours Division of the Department of Labor.

OTHER PAYROLL DEDUCTIONS In addition to these deductions required by federal and state legislation, other deductions, such as hospital care insurance (hospitalization) and group insurance premiums, may be made. In most firms these deductions are voluntary because an employee may decide whether or not he wishes the protection which these company insurance plans provide. Generally this authorization may be canceled by the employee at any time.

EMPLOYER TAX RETURNS *Broadly speaking, the employer's duties* (and, therefore, really the secretary's duties in some offices) are:

1. *To keep accurate, complete records on each employee,* including the remuneration paid and the taxes deducted.
2. To deduct the employee's taxes from his earnings when such earnings are paid.
3. To furnish a written statement to the employee showing the amount of taxes deducted.
4. To file with the district Collector of Internal Revenue quarterly reports accompanied by remittances covering the employer's and employee's tax.

These duties are summarized in the following calendar of employer's duties.

CALENDAR OF EMPLOYER'S DUTIES

On hiring new employees:

Get from each new employee a withholding exemption certificate on Form W-4.

Make a permanent record of the Social Security Account Number of each new employee.

On each payment of wages to an employee:

Withhold amounts for social security tax, income tax, and unemployment tax (if collected from employees).

By the fifteenth day of each month:

Deposit the income tax withheld in the previous month, if it is more than $100, in a depositary bank authorized by the Secretary of the Treasury.

On or before each April 30, July 31, October 31, and January 31:

File a quarterly return on O.A.B. Tax and Withholding Tax with the Collector of Internal Revenue; pay the full amount of taxes withheld in the previous quarter.

On or before January 31 and at the end of an employee's employment:

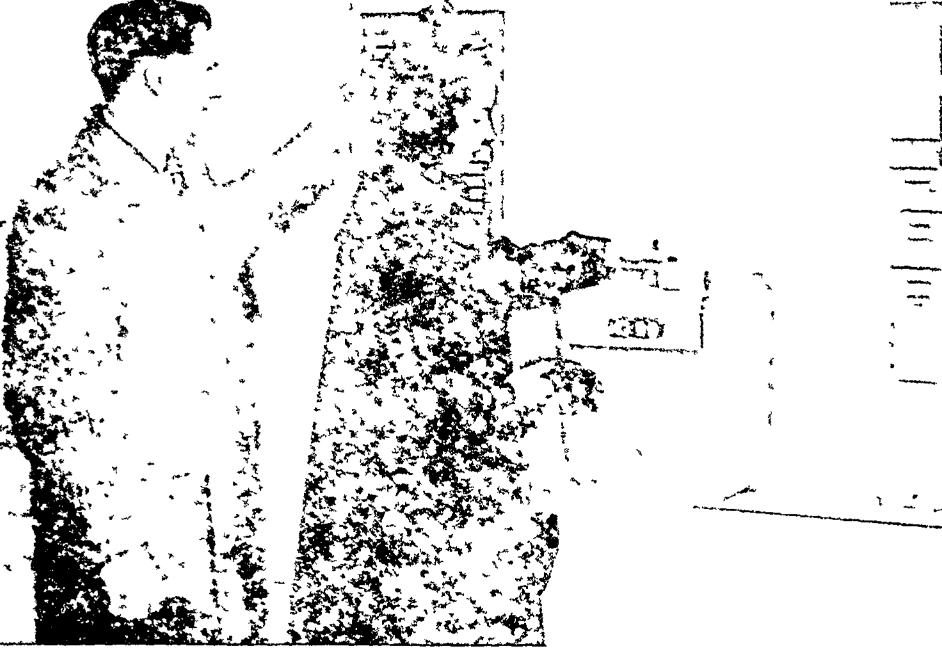
Give each employee a statement in duplicate on Form W-2 showing the total wages and the amount of income tax withheld.

On or before January 31 of each year:

File Form W-3 "Reconciliation of Quarterly Returns," together with a copy of all withholding statements furnished employees on Form W-2 for the preceding calendar year.

Payroll Duties

There are primarily two classes of remuneration, *wages* at a rate per hour and *salaries* at a rate per week or month.



EMPLOYEES USING ELECTRIC TIME CLOCK

The employee takes her timecard from a card rack and slips it into an electrically operated time-recording clock. The exact time of entering or leaving is stamped on the card.

ruled sheet for the pay period, or it may be the secretary's responsibility to check each person in and out daily on such a time sheet. Even though the time records are not necessary to compute the salaries, it is advisable to keep them for several reasons. The psychological effect in itself tends to cause employees to be more punctual. A second reason is that such records may be the basis of paying overtime earnings or balancing time off with overtime worked by those employees who come under the Wages and Hours Law. Then, too, there are occasions when the employer is interested in the time off or overtime for his salaried employees for special reasons. For example, a competent, but good-times-minded, business girl asked for frequent leaves of absence. Her time record disclosed that she had taken leaves totaling twelve months in the last thirty-six. The firm employing her naturally decided that she could not be seriously needed if the office was able to do without her services literally every third month.

The secretary in any of several kinds of offices, such as that of a public accountant, engineer, or lawyer, usually receives periodic time reports from each person on the staff showing

EMPLOYEE'S EARNINGS RECORD

19____ Period Ending		Regular Earnings	Overtime Earnings	Total Earnings	Deductions O.A.B. Tax	Income Tax Withheld	Group Ins.	Other	Net Amount Paid
1	January 15	90.00		90.00	1.35	9.40	.50		78.75
2	January 31	90.00		90.00	1.35	9.40			79.25
3	February 15	90.00		90.00	1.35	9.40	.50		78.75
4	February 28	90.00		90.00	1.35	9.40			79.25
5	March 15	90.00	5.00	95.00	1.43	10.00	.50		83.07
6	March 31	90.00		90.00	1.35	9.40			79.25
Quarterly Total		540.00	5.00	545.00	8.18	57.00	1.50		478.32
Yearly Total		2160.00	16.00	2176.00	32.64	227.40	6.00		1909.96

NAME	Social Security Number	Department	Nature of Work	Works in (State)
Carruthers, Mary F.	269-09-7106	Office	Secretary	Missouri

EMPLOYEE'S EARNINGS RECORD

The data for an individual employee's earnings record are obtained each period from the payroll record. Some payroll machines make the entries on both records at the same time.

illustration above shows a form that provides quarterly totals as well as the annual total, because certain federal and state forms must be submitted each calendar quarter. Even though the laws affecting payroll taxes are changed from time to time, a comprehensive record of the type illustrated will provide the basic data from which almost any type of payroll tax report can be prepared.

PAYING BY CHECK Salaries and wages are paid either by check or in cash. If the former method is used, each payroll check is made out for the amount of net earnings as shown on the payroll record. The name of the employee may be typed on an inexpensive small envelope and the signed check and deduction slip enclosed.

PAYING IN CASH The procedure of paying in cash is simple, but it entails more work than paying by check. The total amount of cash needed for the pay roll is determined by adding together the individual net earnings of the employees.

The accuracy of such a change sheet can be proved by converting the number required of each denomination into the amount of money it represents. The total of the amounts, if no errors have been made, is identical with the total money to be paid out.

Finally a payroll ticket or slip, as illustrated on page 444, is made out from the change sheet for the teller at the bank. This form is usually supplied to business depositors without charge by the bank.

Preparing the Pay Envelopes. When the cash for the payroll has been secured from the bank, the next steps follow in simple order:

1. Prepare receipts showing deductions from total earnings.
2. Write or type the name of each employee on an envelope.
3. If you want to indicate on the envelope the amount to be enclosed, write it lightly in pencil on the inside of the flap or on the part to be covered by the flap.
4. Count out the exact amount of money and enclose it in each envelope.
5. Enclose the receipt for deductions.
6. Seal the envelopes. As a precaution, do not seal the envelopes until all of the money is enclosed. If you have made an error, it takes much less time to check through the unsealed envelopes than to tear them open and subsequently write new ones.
7. Arrange the envelopes for distribution.
8. Last of all, destroy the change sheet, or attach it to the payroll record and put them both in a confidential file.

VERY CONFIDENTIAL No employee wants another to know what he is earning, either because he believes he is getting more than another or because he fears he is getting less. Aside from the care and the mathematical accuracy required, the secretary must guard her payroll facts. There are several unmistakable secretarial sources of information for the inquisitive. The payroll computation sheet, which lists the rates, should not be left out in open view. Someone who is above spying but who sees it in open view cannot help but learn payroll facts from it. Put this sheet inside your desk

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QUESTIONS ON READINGS

1. If an employee understated his age on Form SS-5, what effect would that have on his right to old-age insurance benefits?

2. Secure a copy of Form SS-5 and read the instructions on the back. Then answer these questions:
   (a) Does an employee apply for a new social security number when he changes jobs?
   (b) Must an applicant for a social security number be employed at the time he makes application?

3. Assume that an executive's salary is $310 a month:
   (a) In what month will his last O.A.B. tax be deducted?
   (b) On how much of his salary for that month will the O.A.B. tax be calculated?

4. If an employee's weekly wages are $27.95, how much would the employer deduct for O.A.B. taxes in a quarterly period?

5. For the employee referred to in Question 4, what would be the employer's quarterly O.A.B. tax? Is it greater or less than the employee's deductions? Why?

6. What would be the gross weekly earnings of a secretary who worked 43 hours during the week, if her regular salary is $48 for a 40-hour week and if she is paid overtime at the rate of one and one-half times her regular rate?

7. In your state do employees make contributions for unemployment compensation?

8. If you were in charge of payroll records in an office, would you include on the receipt for social security tax deductions the amount of income tax withheld?

9. If you were in charge of payroll records and your employer did not request you to keep a time sheet for office employees, would you do so anyhow? Give your reasons.

10. On a payroll change sheet, what denominations would be used to pay $33.92 if there is a company policy to use no $2 bills

PROJECTS

A. Calculating Hours Worked. You are responsible for keeping the daily time record for the eight employees in the Advertising Department of Continental Products. Prepare a time record sheet, showing the number of hours worked each day and the total for the week for each employee, for the week ending Saturday, February 14. The office hours are from 8:45 a.m. to 12 noon and 1:00 to 5:00 p.m. from Monday to Friday and from 8:45 a.m. to 12:30 p.m. on Saturday. Use the following data:

Arthur Webster (artist) came and left on time each day.

Ralph Mayer (artist) left at 4:30 on Tuesday (headache); worked until 5:30 on Wednesday to make up the half hour lost on Tuesday; worked until 7:00 on Thursday (rush job on Ranger account); otherwise worked regular hours.

Eldon Shafer (copy writer) took an hour and a half for lunch Tuesday (late); was 30 minutes late Wednesday morning; was 15 minutes late Thursday morning; was ill and did not report at all Saturday.

David Roberts (artist) came on time each day. He worked until 6:00 on Thursday and Friday, and until 2:45 on Saturday on the rush Ranger advertisement.

Paul Burke (copy writer) worked regular hours throughout the week.

Tom Wilson (office boy) worked regular hours throughout the week.

Mildred McDaniel (stenographer-clerk) was 30 minutes late Monday morning; worked until 5:30 Wednesday to make up time lost on Monday; worked until 6:00 on Thursday to get out some correspondence.

Mary West (secretary) on time every day; worked until 6:00 Wednesday and Thursday nights on correspondence and records; worked until 7:00 Friday night and until 1:45 on Saturday helping on the Ranger advertisement.

B. Calculating Net Pay. Complete a weekly payroll sheet calculating the net earnings for the week for the employees listed in the preceding project. Use the current O.A.B. tax deduction rate and the current withholding tax table. These tables may be obtained from your nearest office of Collector of Internal Revenue or from your post office. A 50-cent weekly deduction is made from each employee for group insurance. All employees claim two withholding tax exemptions with the exception of Mildred McDaniel and Mary West, who claim only one exemption.

All employees paid on an hourly rate are paid for overtime work at the rate of one and one-half times their regular rate for all hours in excess of 40 worked in any one work week. No over-

CHAPTER 22

LEGAL WORK OF THE SECRETARY

MANY of the legal procedures and papers discussed in this chapter are common to practically all secretarial positions. It is important, therefore, that you be familiar with this information so that you will be qualified to discharge capably the legal duties of your position. The following discussion is intended as a supplement to, not as a substitute for, an introductory or general course in business law.

NOTARY PUBLIC The secretary is often asked to be a notary public or to have legal papers notarized. A notary is empowered by the state in which he or she lives to administer oaths, to issue protests, and to take acknowledgments of deeds and other instruments. Usually the work of the notary consists of certifying that a legal paper was signed in the notary's presence and that the signers have sworn that they are the same persons referred to in the document.

It is often a convenience to the employer to have his secretary be a notary public. It is just as likely, however, to be a decided nuisance to the secretary, for persons will come from blocks around to have notary work done just when the secretary is busiest with her regular work. There is one pleasant aspect to it, however. It is a means of extra compensation. Notaries may charge for certifying to signatures. The charge is usually between 25 and 50 cents, depending upon the state. Of course, the secretary does not charge her employer or his clients, customers, employees, or friends.

To become a notary, the secretary writes the Secretary of State in the state capital and asks for instructions and the forms to fill out. There are usually a fee, an examination, and certain citizenship qualifications. In some states a notary is required to give a bond for faithful performance. Her appointment states in which county or counties she is authorized to perform and when her commission expires. It is necessary for her to buy a notary public seal and a rubber stamp. The

State of Ohio , County of Clermont , ss.

Be it Remembered, That on this twenty-third *day of* June *in the year of our Lord one thousand nine hundred* fifty-four *, before me, the subscriber, a* notary public *in and for said county, personally came* Allan L. Shumard and William B. Smysor *the grantors in the foregoing Mortgage, and acknowledged the signing thereof to be* their *voluntary act and deed.*

In Testimony Whereof, *I have hereunto subscribed my name and affixed my* notarial *seal on the day and year last aforesaid.*

M. L. Mason

ACKNOWLEDGMENT

An acknowledgment is generally attached to deeds, mortgages, and other legal instruments as a prerequisite to recording them. The notary public's signature certifies that the facts stated in the acknowledgment are true.

former is used to press into the document the seal showing her name, the county in which she is commissioned to act, and the seal of the state. The rubber stamp shows the date when the commission expires. Each notary must comply with the rules of the state according to the instructions furnished her. Ordinarily the employer pays the cost incident to becoming a notary when the secretary is doing so at his request.

A notary does not scrutinize the document she is to certify. She simply verifies that the signature or signatures are genuine. If you should become a notary, remember not to be curious about what is in the paper you are certifying.

POWER OF ATTORNEY The employer may vest his secretary with a power of attorney—the power to act for him. The document itself sets forth the powers given. It may authorize the secretary to sign checks and other legal documents for the employer. It may be made for an indefinite period, for a specific period, or for a specific purpose only. Only a tried and true secretary whose business integrity is unimpeachable earns this decidedly weighty responsibility of acting as her employer's agent.

Should the employer have power of attorney for another, the secretary should set up a special file and record all executions under such a power.

THE SECRETARY AS NOTARY PUBLIC

The secretary who is a notary public is called upon to certify signatures on legal documents. She signs the papers and affixes her notary seal.

AFFIDAVITS An affidavit is a written declaration made under oath that the facts set forth are true and correct. The word itself means "he has made oath." An affidavit must be sworn to before a public officer, such as a notary, a judge, or a justice of the peace.

Affidavits are made in lawsuits or whenever it is necessary to have sworn statements of fact. An affidavit is usually required from a contractor, stating that he has paid all of his subcontractors and labor, before payment is made to him.

RECORDING OF LEGAL PAPERS Legal papers and procedures pertaining to real estate were discussed in Chapter 20, Investment and Insurance Details. The recording of real-estate documents in the county recorder's office serves as a notice to the public of the action set forth in the document. Deeds evidencing the transfer of title to property are recorded in the county in which the property is located. Recording

establishes legal rights to property. A dishonest grantor might sell the same piece of property twice, but the buyer who has the deed recorded first has prior claim.

Mortgages are also recorded. Such recording protects the mortgagee and gives notice of the encumbrance on the property so that a subsequent purchaser will be forewarned.

The secretary may be requested to take a deed or a mortgage to the recorder's office in the courthouse and to pay the recording fee. At the recorder's office the date and the time of receipt are stamped on the paper under the endorsement.

COPIES OF LAWS Occasionally the secretary will be asked to get a copy of a certain law for her employer. Copies of laws affecting the employer's operation of his business are usually obtained, studied, and filed.

Copies of laws may be obtained as follows:

National Laws

Write your local Congressman and request him to send a copy. He likes opportunities to be of service to his constituents.

Write the Superintendent of Documents, Washington, D. C., and request the law. There is usually a small charge.

State Laws

Write the Secretary of State at the state capitol or the state library. Copies may be distributed free, or a small charge may be made.

Synopses of laws may be studied in the public law libraries. *The World Almanac* carries synopses of some laws, such as the Fair Labor Standards Act and the Federal Communications Act. The local chamber of commerce usually keeps on file copies of laws and subscribes to law services.

Law services are current legal reference books of loose-leaf pages numbered with the Dewey Decimal System or some other expandable numbering system. These books are in constant revision. New pages and corrected pages are sent out as soon as changes in the law or interpretations occur. Such a loose-leaf service is only as good as the secretary responsible for inserting the newly furnished pages. That is a job which must be done promptly and carefully, for the page numbers may be seven or eight digits long.

CONTRACTS Everyone in the business world is concerned with the legal relations pertaining to buying and selling—of goods, of property, and of services. Every buying and selling activity may constitute a contract between or among the persons concerned. A contract is an enforceable agreement, either oral or written, which involves legal rights and responsibilities. Some contracts, such as those for the purchase of real estate, must be in writing, but all important contracts should be written even though that is not a legal requirement. A contract may be in the form of a sales slip, a memorandum, a contract form, or a note.

Carefully read all contracts before signing them. The secretary may arrange with a typewriter company, for example, to service the office machines at an annual rate. The form she signs is a contract, with the company agreeing to service the machines for the year at the rate specified and with the employer agreeing to pay for such services.

Learn to recognize a contract and to discipline yourself to read every word of it so that you are aware of the provisions, the amounts, and the terms. Reading can prevent mistakes, misunderstandings, and fraud. By careful reading you can determine such information as the responsibilities assumed by each party, exactly what is offered at what price, how payment is to be made, whether or not material can be returned, and when and how the contract can be terminated. Sometimes portions of a contract form are printed in very small type to conserve space or in the hope that they will not be read. This should be a warning to the secretary that a careful reading is all the more important.

If you are requested to type a contract, the following essential information should be included:

1. Date and place of agreement
2. Names of parties entering into the agreement
3. Duties of each party
4. Money, services, or goods given in consideration of contract
5. Signatures

Prepare enough copies of each contract so that each party will have one for his file. When an employer sells his services by contract, as do engineers, architects, builders, and real-

estate representatives, the secretary may have a standard form to use as a model; but usually there are items peculiar to each contract that make it necessary to vary the form each time. A secretary to an engineer finds it timesaving to make an extra copy of every contract for her own model-contracts file. The signed contract is filed in a sealed envelope with the job in question. An unsigned copy is placed in the model-contracts file. Then when a new contract is to be written, she removes similar model copies from the file for the employer.

The signed copy of a contract should be filed carefully, for it is a legal instrument necessary to prosecuting any deviation from the contract. It is well to place the contract in a No. 9 or No. 10 envelope and mark plainly on the outside, "Signed contract between .....". This can be filed permanently with the customer's file or in a separate *signed-contracts file,* or if it is important enough, in a safe-deposit box.

The secretary's signature, if she is authorized to sign for the employer, binds him to a contract, even if the contract is in the form of a letter ordering supplies or accepting an order placed with the employer.

FORMAL BIDS An employer selling services or goods may be asked to submit a formal, sealed bid for contemplated work or sale of materials if a considerable sum of money is involved. Each such request for bids states:

(a) The time on or before which bids must be filed—usually 12:00 noon on a certain day.
(b) The place where the bid is to be filed.
(c) The services to be performed or the goods to be furnished, the specifications, and where the plans are on file for study.
(d) The number of copies of the bid to be submitted.
(e) The nature of sworn statements that are to accompany the bid.
(f) A statement as to whether a performance bond, guaranteeing that the bidder will execute the contract at the price bid if awarded the contract, is required.

A bid must conform in every detail to the requirements set forth, or the bid will not be considered. The preparation of bids is a job that requires a great deal of careful estimating by the employer and very careful, accurate typing by the secre-

tary. Furthermore, it is the secretary's responsibility to see that the bid is finished and filed within the time limit, that the proper number of copies is made and submitted, that one or two copies are made for office files, that any requested sworn statements accompany the bid, and that a performance bond is executed and submitted if required.

WILLS

A will is a legal instrument whereby a person provides for the disposition of his property after his death. A *testator* (man) or *testatrix* (woman) is the one making the will. An *executor* (man) or *executrix* (woman) is the one named in the will to administer the estate. An *administrator* (man) or *administratrix* (woman) is the one appointed by the court to administer an estate when no will has been left. One who dies without having made a will is said to die *intestate*. A *nuncupative* will is an oral one made in the last illness of the deceased. Lands may not be bequeathed by a nuncupative will. A will written, dated, and signed in the handwriting of the testator is called a *holographic* will.

A will may be *revoked* by mutilation, cancellation, destruction, or execution of a new will. Every will should contain a provision stating that any and all previous wills are revoked even though the testator does not remember ever having made another will. A *codicil* is a modification of a will that is written below the signatures. It may add to, qualify, or revoke any or all of the provisions of the original instrument. It must be signed and witnessed with all of the formalities of the original will. To *probate* a will is to prove its validity to the court and to get permission to carry out its provisions.

Wills are not recorded in a book of public record nor are duplicates always made so that the one copy must stand on its own as to authenticity and correctness. Therefore, it simply must not be lost. The fact that the employer is making a will, its contents, and the place of safekeeping are strictly confidential matters—a fact the secretary never forgets. A business person generally places his will in a sealed envelope in a safe-deposit box at the bank.

If the secretary is asked to *attest* (witness) a will, she should not try to read the provisions. She is merely witnessing the signature of the testator and assuring the beneficiaries that he

LAST WILL AND TESTAMENT OF THOMAS J. BERRY

I, Thomas J. Berry, of the City of Billings and the State of Montana, do hereby declare this to be my last Will and Testament. Upon my death, I wish the following instructions carried out:

FIRST: All my just debts, funeral expenses, and the cost of administering my estate may be paid by my executrix, who will be named later in this will.

SECOND: I direct my wife, Maybelle Berry, to sell the real property located at 616 Vine Street, Billings, Montana, and to use the proceeds for the college education of my two children, Charles Peter Berry and Joan Mildred Berry, the education to be administered as my wife sees fit. Any surplus not needed for their education will revert to my wife.

THIRD: All the remainder of my real, personal, and mixed property I give to my wife, Maybelle Berry.

FOURTH: I hereby appoint my wife, Maybelle Berry, executrix of this, my last Will and Testament, and I ask that she not be required to give bond or security for the performance of her duties.

FIFTH: I hereby revoke any or all former wills made by me.

IN WITNESS WHEREOF, I have set my hand and signature this eighteenth day of January, in the year nineteen hundred fifty.

Thomas J Berry

Signed, published, and declared by Thomas J. Berry, named above, as and for his last Will and Testament in the presence of us and each of us, who, in his presence, and at his request, and in the presence of one another, have subscribed our names as witnesses on the day and in the year indicated above.

K. T. Brock	1312 Silver Street, Billings, Montana
Frank R. West	319 Stirling Drive, Billings, Montana
Edward A Craig	3466 Trinble Avenue, Billings, Montana

WILL

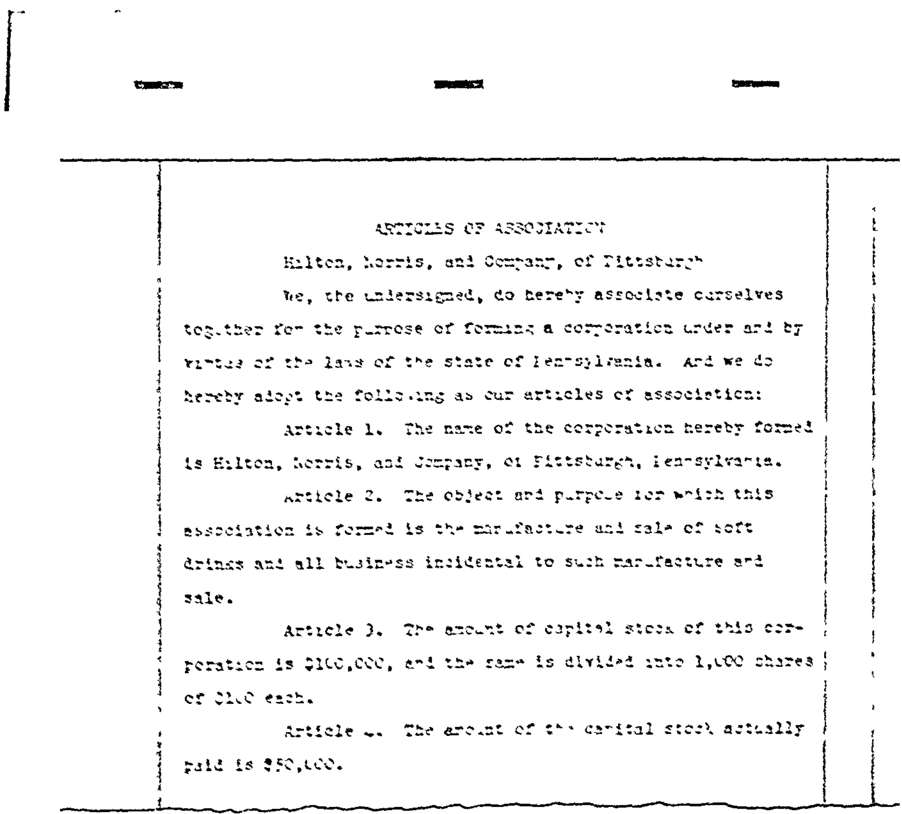
A will must be typed accurately. Typing errors can cause much litigation, expense, and trouble when the estate is being settled; therefore, be sure that every word and punctuation mark is accurately transcribed. Use legal-size paper, if possible, and double spacing. Have a heavily inked ribbon on your typewriter, for the will may not be opened and read for many years.

Some secretaries lightly pencil in the respective initials at the beginnings of the lines on which each is to sign. Other secretaries use a small "X" to mark the spot. The names may be typed under the signature lines as in business letters. If this is done, it is unnecessary, of course, to mark them. Names are typed on the signature lines on the file copies preceded by an acceptable indication for *signed*, such as *Sgd.*

The letters L.S. frequently appear at the end of lines on which parties to a paper sign their names. This abbreviation has the same legal significance as a wax seal with ribbons and other decorations. Not all legal papers require a seal. The laws of the various states regulate this point.

PORTION OF A TYPEWRITTEN LEGAL PAPER WITH COVER SHEET

Legal papers are commonly bound with a single-sheet cover, usually pale blue, of tough, heavy quality. These are called manuscript cover sheets, or backing sheets, and are 9 by 15 inches. The top edge is folded down about $1\frac{1}{4}$ inches to form a flap under which the top edges of the typed papers are evenly placed.



ARTICLES OF ASSOCIATION

Hilton, Morris, and Company, of Pittsburgh

We, the undersigned, do hereby associate ourselves together for the purpose of forming a corporation under and by virtue of the laws of the state of Pennsylvania. And we do hereby adopt the following as our articles of association:

Article 1. The name of the corporation hereby formed is Hilton, Morris, and Company, of Pittsburgh, Pennsylvania.

Article 2. The object and purpose for which this association is formed is the manufacture and sale of soft drinks and all business incidental to such manufacture and sale.

Article 3. The amount of capital stock of this corporation is $100,000, and the same is divided into 1,000 shares of $100 each.

Article 4. The amount of the capital stock actually paid is $50,000.

STANDARD LEGAL FORMS Undoubtedly your employer will engage legal counsel when preparing important legal papers. If, however, certain types of papers are often used, such as leases or deeds, the forms given in legal reference books can be used as guides. The library has such books for reference and perhaps for circulation. Avoid indiscriminate copying of such forms, however, because the laws vary in different states. Stationery stores supplying legal offices carry printed legal forms that concur with the laws of the state. These can be purchased at nominal prices. When the secretary uses a printed legal form, she must be careful to complete all fill-ins correctly. It is not always easy to detect the points at which additions may be necessary. For example, in a lease the expression "Said Lessee Agree to pay said rent" may appear. A casual reading may not reveal that there is a space after the word "Lessee" and another after the word "Agree," one of which must be filled in to make the statement complete and correct. Either an *s* is added to make the subject plural in agreement with the verb as it is printed or an *s* is added to the verb to make it singular in agreement with the subject as it is printed.

Many printed legal forms consist of four pages. They are printed on both sides of one sheet of 8½ by 28-inch paper, which is folded once to make four pages of 8½ by 14 inches. The form for the endorsement is printed on page 4. With this arrangement binding of the pages at the top is unnecessary and a cover is not used. When the front page (page 1) is turned, pages 2 and 3 really constitute one continuous page down the full inside length of the document.

PATENTS A patent may be obtained by a person who has "invented or discovered a new and useful art, machine, manufacture, or composition of matter, or any new and useful improvement thereof—not known or used by others in this country before . . ." Free pamphlets on patent laws and rules of practice may be obtained from the Commissioner of Patents, Washington, D. C.

A patent grant gives the exclusive right to make, use, and sell the patent. A patent must be applied for by the inventor. After the patent has been granted, it can be sold outright or

leased, in which case the inventor is paid a royalty for its use. A patent expires at the end of seventeen years and can be renewed only by an act of Congress.

COPYRIGHTS Creative work reproduced for sale or public distribution may be copyrighted. Copyrighting applies not only to printed matter, such as books and periodicals, but also to photographs, pictorial illustrations, musical compositions, maps, works of art such as paintings, and movies.

To copyright is to register a claim with the Federal Government to a piece of original literary or artistic work. A copyright grants the exclusive right to reproduce a creative work or to perform it publicly. Registering is done either by the originator of the work or the one reproducing and marketing copies. Copyrighting tends to prevent a dishonest or careless person from stealing another's creative work and marketing it as his own.

Each piece of work to be registered must carry a copyright indication. Books usually show the copyright line on the title page or on the page immediately following. The year given is the one in which the work was presented to the public. Each revision of a book is registered and the new date used or added to the copyright line.

Copyrights run for twenty-eight years and may be renewed once for twenty-eight more years. Matter sent for copyright registration may be sent free if it is taken to the office of the postmaster, who will forward it in a "penalty" frank envelope. A letter, however, accompanying the material is attached to the package and postage paid for it.

Creative written work that is not published can be protected from copying by the following simple device. The author mails himself one copy of his work by registered mail. This he keeps unopened. If anyone having access to another copy should plagiarize his work, the author can obtain damages by proving that his manuscript was in existence on the date shown by the cancellation stamp on the envelope. The sealed edges of a registered package or envelope are stamped at the post office, making it impossible to open and re-seal it without that fact being evident.

LEGAL ASPECTS OF EMPLOYMENT RELATIONSHIPS An employer is responsible for the safety of his employees. He must see that the working place, the tools, the machinery, and the equipment are reasonably safe and suitable. Failure to use the necessary safeguards makes the employer liable for damages if injuries are incurred by an employee.

When an employee becomes burdened with debt, the creditor in some states may garnishee the debtor's wages, that is, send an order from the court to the employer directing him to forward a certain part of the debtor's wages each pay time to the creditor to apply on the debt. Many companies have a rule that any employee who has his wages garnisheed automatically loses his job. This may sound harsh, but it is practiced for the employee's benefit so that he is not tempted to go too heavily in debt.

A person looking for a position quite often *lists* with an employment agency, that is, he fills out an application blank and signs a contract agreeing to pay a portion of his income (usually for the first month) to the agency for placing him in a satisfactory position. In one instance a girl who quit a position after one week's employment was compelled to pay a percentage of a full month's salary. Inquire into the reputation of the agency with whom you list and do not take a position unless you are certain you will like it.

The secretary can render a real service to her employer if she will make a permanent record of the name and the address of the nearest relative of each employee. Once in a great while a company needs one of its former employees to serve as a witness in the company's behalf in a court case. The name of a near relative often helps to locate the former employee.

REFERENCE READINGS

CALLAHAN, PARNELL. *How to Make a Will.* New York: Oceana Publications, Inc., 1948, 96 pp.

CONNELLY, EVA L., and MARONEY, THOMAS P. *The Legal Secretary.* New York: The Gregg Publishing Company, 1945, 298 pp.

HUTCHINSON, LOIS IRENE. *Standard Handbook for Secretaries.* New York: Whittlesey House, 1941, pp. 459–476.

WANOUS, S. J., and ERICKSON, L. W. *The Secretary's Book.* New York: The Ronald Press Company, 1948, pp. 127–165.

3. If a student wanted to protect himself against plagiarism of material in an unpublished thesis, how could he do so?

4. Suppose you were asked to rush out a legal paper for the employer to have signed by persons waiting in his office. You typed it quickly, checked it even more quickly, and handed it in. After the signers have gone, you notice you have made a serious error in a date. What would you do?

PROBLEMS

1. Type the following affidavit, making one carbon copy.

State of Ohio, County of Franklin. George R. Richards, being duly sworn, deposes and says that he has been employed by and has worked for the Reliable Furniture Company, 2185 North High Street, City of Columbus, County of Franklin, State of Ohio, continuously for the past fifteen years.

____

Sworn to before me this
(Use current date.)

____
Notary Public
Franklin County

2. Type the following proxy, making one carbon copy. Use the current date.

PROXY

KNOW ALL MEN BY THESE PRESENTS, That I, the undersigned, do hereby constitute and appoint Richard D. Long to be my true and lawful attorney to represent me at the special meeting of the stockholders of The Ramsey Manufacturing Company, to be held on (insert here a date that is two weeks from current date), and for me, and in my name, place, and stead, to vote at the said meeting upon stock standing in my name on the records of the said company at the time of the said meeting; and I do hereby grant to my said attorney all the powers that I should ordinarily possess if I were present in person. (¶) IN WITNESS WHEREOF, I have hereunto set my hand and seal this____________
day of________________one thousand nine hundred
and________________

________________________(SEAL)

____

Witness:

____

3. Type the following agency contract, making two carbon copies. Use the current date.

AGENCY CONTRACT

This agreement, made and entered into on this, the________day of________________, 19____, by and between THE BLOME PRODUCTS CORPORATION, a corporation of Butte, Montana, the party of the first part, and JAMES L. TILLAR, of Boise, Idaho, the party of the second part, (¶) WITNESSETH: That, whereas, the party of the first part is about to open a branch office, to be located in Boise, Idaho, for the sale of its products, the said party of the first part hereby engages the services of James L. Tillar, the party of the second part, as manager of that office. (¶) The party of the first part hereby agrees to pay to the party of the second part a monthly salary of Three Hundred Dollars ($300), payable on the last day of every month, for a period of one year from the date of this contract. (¶) The party of the first part hereby agrees to pay all reasonable office expenses, including rent and salaries of such help as shall be agreed upon from time to time between the parties hereto. (¶) The party of the second part agrees to give his undivided time and attention to the business of the party of the first part and not to engage in any other business or occupation while in the employ of the party of the first part. (¶) The party of the second part also agrees that he will be governed at all times by the instructions of the party of the first part with regard to all contracts entered into with third persons for the party of the first part, that he will render a report of each and every sale at the time of such sale, giving a detailed account of the products sold, the prices, and the terms of the sale; and that he will submit each month to the party of the first part an itemized list of office expenses. The party of the second part agrees also to make all collections for products sold by his office and to make remittances of funds on hand as directed by the party of the first part from time to time. (¶) IN WITNESS WHEREOF, the parties have hereunto affixed their hands and seals on the day and in the year first above written.

THE BLOME PRODUCTS CORPORATION

______________________________(SEAL)

President

Party of the First Part

______________________________(SEAL)

Party of the Second Part

Witnesses:

____

____

PART VI

OFFICE EQUIPMENT AND ORGANIZATION

CHAPTER 23

CHOOSING THE DUPLICATING PROCESS

DUPLICATION is to the modern office what mass production is to the factory. It would be almost physically impossible to carry on the modern business office with its many varied and complicated functions without the facilities of modern duplicating devices. The process of duplication is under constant change. A continuous effort is being made to develop more economical, rapid, and easy means of duplicating printed, typewritten, and handwritten materials. If you are to perform your duties efficiently as a secretary in the modern office, you must be familiar with the various duplicating devices available and how they may best be used, and be constantly on the alert for better ways of reproducing the many bulletins, reports, and forms which must be duplicated in an office.

In large offices that maintain special duplicating departments, you may have the responsibility of preparing the guide copy of materials, and of selecting the duplicating process to be used for each type of material which comes from your office. In some cases you may be required to prepare your own master copy to be used on the duplicating equipment. In smaller offices you may be responsible for operating the duplicating equipment that is available and for making recommendations for additional equipment when needed.

Since there are several ways by which materials may be reproduced, the selection of the method best suited to the work to be done requires careful planning. This planning must include the consideration of such features as the number of copies required, the use to be made of the copies, the desirability of color other than black, and the economy of production.

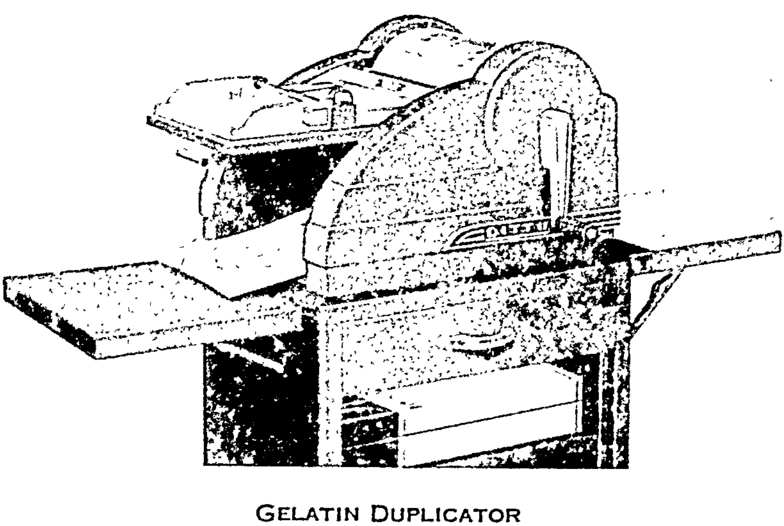
The principal processes of office duplication are: carbon copies, gelatin, fluid, stencil, typeset, offset, and photographic. Each has special advantages and is adapted to certain types of office work.

Types Of Duplicating Processes

CARBON COPIES The most common form of duplication in the office is preparing carbon copies on the typewriter. In fact, almost everything that is typewritten in the office is duplicated in this manner. However, if many copies of an item are desired, the limitations of this method are obvious. The number of readable copies that can be produced under the best of conditions is limited, and the copies decrease in clearness and smudge with use. Duplicating in quantity by carbon copies is time consuming and expensive.

GELATIN DUPLICATING PROCESS The gelatin (Hectograph) process was the first type of duplicating process to gain wide use in the office. Its economy and simplicity of operation made it adaptable to small as well as to large offices. Although other duplicating processes have been developed, the gelatin process is still used widely.

The principle of the gelatin duplicator is simple. By the use of a special hectograph ribbon, carbon paper, pencil, or



GELATIN DUPLICATOR

This type of duplicator is manufactured by several different companies and in several different styles. They may be either hand or electrically operated.

ink, a dye is transferred to a master sheet when the copy is prepared. The master copy is then placed face down on the surface of a gelatin pad and left for a short time. The gelatin pad takes up the dye from the master sheet and leaves the impression in reverse form. The impression from this copy in the gelatin pad is then offset on each sheet of blank paper passed over the pad so long as any coloring matter remains on the gelatin.

The first gelatin duplicator was merely a flat pan filled with a gelatin composition. Since that time, however, it has been much improved. The most convenient gelatin reproducing equipment at the present time is the rotary type, which utilizes a gelatin pad or film clamped around the outside of a drum. The pad is changed with each use.

Although colors such as red, green, or blue may be reproduced, the best reproductions are obtained in purple. Several colors can be reproduced at the same time.

Usually up to fifty clear copies may be produced from one master copy. Thus the gelatin duplicator is used for short runs only. It is widely used for interoffice notices and information and for notices going to salesmen on the road.

Since duplicates are produced from the master copy, this method has certain special uses for which other duplicating methods are not adaptable. For instance, a large pharmaceutical company uses a master-sheet form printed with hectograph ink for salesmen's order blanks. The salesman writes his order and instructions on this form with a hectograph pencil. When the order form arrives in the office, it is used as the master copy for duplicating instructions to the stock department, for shipping instructions, labels, and invoice billings.

Since colors may be used, and since drawings may be made or traced directly on the master copy, it is a convenient type of duplicating process to use for charts, graphs, and such data where only a limited number of copies are needed.

DIRECT OR LIQUID PROCESS

The procedure followed and the final copies produced by the direct or liquid process closely resemble the gelatin duplicating process. As with the gelatin process, a carbon-typed page is used as the master copy. The copies in the direct process, however, are

limited. Like the gelatin duplicator, it is an economical, convenient, and rapid method to use in making short runs of five to two hundred copies.

An important feature of the fluid process is that the master copy may be filed and re-used for additional copies when needed. It also provides more flexibility in its use than other duplicating methods. Any part of the master may be temporarily blocked out, thus making it possible to produce a number of different forms from the same master. For this reason the fluid duplicator is widely used in billing procedure. One master sheet for an order can be drawn up; and by the use of block-out covers, the shipping labels, invoices, work orders, stock room orders, stock record cards, back-order sheets, and a number of other forms can be reproduced from the one master. Some machines are equipped with a magnetized metal drum. This permits the easy placement and removal of a metal block-out mask. After the master copy is on the machine, different forms may be reproduced from the same master by merely inserting and removing this metal block-out mask.

Since the master copy is made by carbon, it permits tracing so that charts, pictures, and ruled forms may be traced easily and reproduced by this method.

STENCIL PROCESS The most commonly used method of duplicating in the office is the stencil process. The principle of stencil duplicating is very simple. It involves a stencil and an inked drum.

The stencil is a thin tissue coated with a substance that is impervious to ink. When the typewriter key strikes the stencil, the wax coating is pushed aside, exposing the fibers through which the ink can pass when the stencil is placed on the duplicator.

The stencil is placed on a hollow revolving cylinder, which has a perforated surface covered with an ink pad. The ink is applied to the inner surface of the cylinder so that it can pass through the perforations to the pad and openings of the stencil. Thus, ink impressions are made on ink-absorbing paper as they come into contact with the stencil.

The stencil duplicating process produces copies that are clear and accurate reproductions of the original. Several

the price of each item needs to be typed into the stencil on the typewriter.

The stencil duplicator is used in the office for the reproduction of all sorts of reports, bulletins, and forms where a large number of copies are needed or where a small number of copies having high readability are desired.

It is not so convenient or economical to use as other duplicating methods if only a small number of copies are required or if hand lettering or drawings are to be reproduced. The fact that thousands of copies can be made from the one stencil is a distinct advantage.

TYPESET PROCESS The most widely used typesetting duplicator is the multigraph. This process uses prepared type, which is set by machine or hand. In the latter method each letter is picked up by means of a composing fork and placed in a groove on a printing drum. The machine operates on the rotary principle. The ink is supplied by a wide ribbon or inked roller.

There is practically no limit to the number of copies that can be run or to the color or quality of paper used. Since the setting up and disassembling of the type is very time consuming, this process is generally used only for special duplicating projects where appearance is extremely important. Since it produces work very closely resembling that of a typewriter, multigraphed letters may be personalized by typing in the inside address, date, and salutation, and the net effect resembles closely that of an individually typed letter.

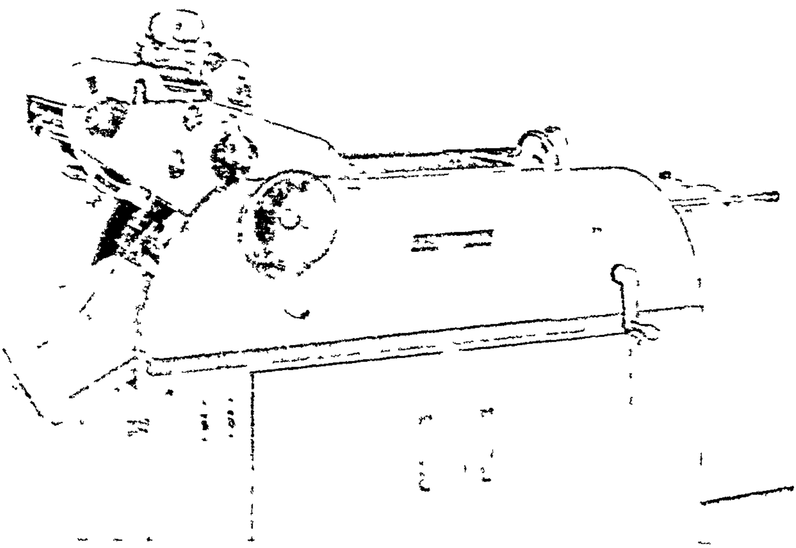
Other types of duplicating have largely replaced the typesetting process in most offices. Its major present use is in letter shops and in advertising departments where direct advertising work is carried on.

OFFSET PROCESS The offset process is based on the antipathy between grease and water. The outlines on the master copy hold the greasy printing ink, while the remainder of the surface attracts water and repels the ink. The ink is transferred or offset from the outline to a rubber blanket; and this, in turn, transfers the copy onto the paper. The plate may be either a thin metal sheet or a special paper

Characteristics	Gelatin Hectograph	Fluid Hectograph	Mimeograph	Multigraph	Multilith
1. Maximum size of copy	18" x 34"	11" x 17"	8½" x 14"	8½" x 14"	11" x 17"
2. Maximum number of copies	60[a]	200[b]	4,000	No limit	No limit
3. Can copy be reduced or enlarged?	No	No	Yes[d]	No	Yes
4. Can we print on both sides?	Yes	Yes	Yes	Yes	Yes
5. Can we print on any bond paper?	No	No	Yes	Yes	Yes
6. Can we print on onionskin paper?	No	No	No	Yes	Yes (8½ x 14)
7. Can we print on card stock?	Yes	Limited (50 copies)	Yes	Yes	Yes
8. Can line drawings be used?	Yes	Yes	Yes	No	Yes
9. Can photographs be used?	No	No	No	No	Yes
10. Can color be used?	Yes	Yes	Yes	Yes	Yes
11. Can hand lettering be reproduced?	Yes	Yes	Yes	No	Yes
12. Can type be reproduced?	No	No	No	Yes	Yes
13. Can reprints be obtained?	No	Yes	Yes	No	Yes
14. Description of results	Purple[c] print	Purple print	Black print (Not as clear as Multigraph or Multilith)	Clear black print	Clear black print

Table adapted from one released by the Office Service Department of the Tennessee Valley Authority giving the limitations in the use of duplicating processes used in the Authority

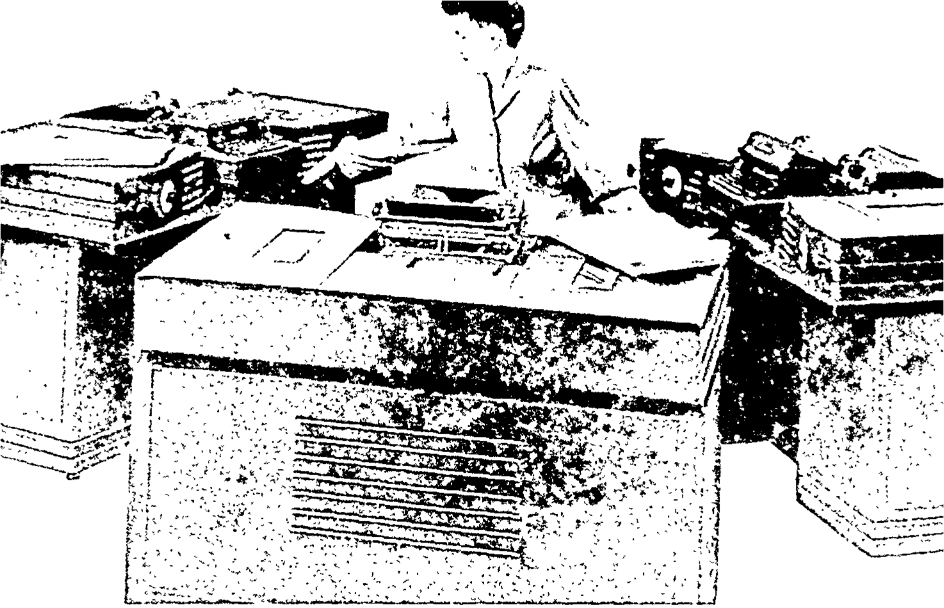
[a] As many as 125 copies may be reproduced if care is used in operating the machine.
[b] As many as 500 copies are frequently made.
[c] Several manufacturers have produced black hectograph carbon paper for black ink copies.
[d] By use of photographic process of stencil preparation.



OFFSET DUPLICATOR
The operation of the offset process duplicator requires a skilled operator. This machine can produce several hundred copies per hour.

plate known as a duplimat master that may be prepared by writing, typing, or drawing. Since it is possible to transfer photographic negatives to the metal sheet, all sorts of charts, pictures, and forms may be reproduced with the appearance of high-grade printing. Where this process is extensively used to reproduce illustrations, the usual practice is to type copy on regular paper and paste in illustrations and printed headings. A picture of the sheet is then transferred by photographic process to the metal master sheet. This gives a uniform effect, and the copy may be reduced or enlarged as needed. It may be reproduced in several colors, with two or more colors on the same page.

The process wherein the master copy is photographed on a metal master sheet is used only where a large number of copies are needed, where appearance is important, or where special charts, drawings, and forms are involved. Letterheads closely resembling printed letterheads may be produced by this method. An unlimited number of copies may be made from a metal master sheet, which may be preserved and reused at any time.



American Automatic Type

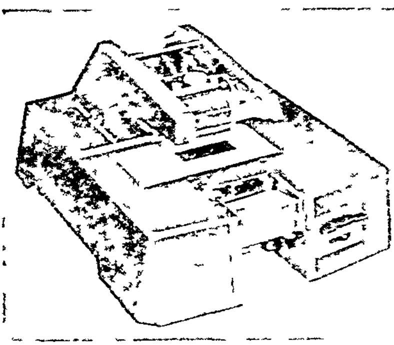
AUTOMATIC TYPEWRITERS

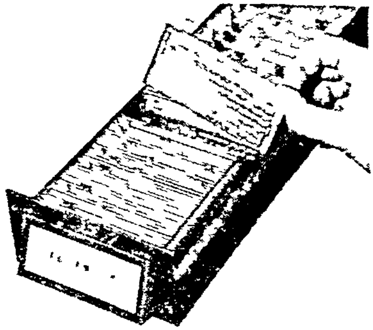
One typist can keep several machines in operation. Each machine can produce as many as 125 letters a day.

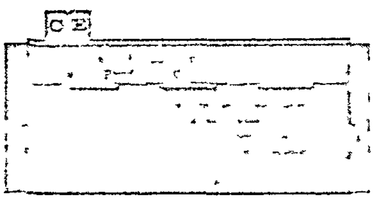
This process would be used only, of course, where a limited number of copies are needed, where exact reproductions of an original are essential, or where the nature of the copy requires a great deal of time in preparing master sheets or stencils for some other form of duplicating process.

The reproduction of insurance applications and physical examination records where exact reproductions of the originals are absolutely necessary is an illustration of a common use of the photographic process. The uses of microfilm for recording checks and deposits in banks, and customer sales slips and statements in department stores, are other common uses of this process. Microfilm is not only a duplicating process but also a method of filing information.

ADDRESSING MACHINES A special kind of duplicating machine is used for addressing mail when the names and addresses make up an active mailing list that is used a number of times, as in advertising or sales campaigns. These machines use either a metallic or stencil address plate. With the former type a special machine, known as a Graphotype, is necessary for embossing the names, addresses, the dates, and other information on the metal plates. Stencil







ADDRESSING MACHINE AND PLATES

Addressing machine models range from portable hand-operated machines to large, high-speed automatic machines that can produce several thousand impressions per hour. Addressing plates are kept in trays similar to the one illustrated.

address plates may be prepared on an ordinary typewriter in a manner similar to that of cutting any other stencil.

The addressing machine is used not only for envelope addressing but also for mailing strips on the margins of newspapers and magazines, for inside address fill-ins on letterheads and cards, and for many other purposes in the auditing, traffic, production, shipping, collection, and payroll departments. It can be economically used any place where names and addresses must be repeatedly filled in on a number of business forms.

To make their service available to business firms whose volume of use would not justify the expense of the purchase of the Graphotype for preparing the metal plates, the Addressograph-Multigraph Corporation operates a plate-embossing service in the larger cities. Plates are prepared for customers so that it is necessary for each customer to own the addressing machine only.

COMMERCIAL DUPLICATION All of these duplicating processes would be found only in the very large office that maintains its own duplicating department. You should remember, however, that in every city there are commercial shops that make a specialty of various kinds of office reproduc-

tion work. These businesses are usually listed in the classified directory of the telephone book under such headings as "Letter Service" or "Letter Shops." They will prepare the master copy, furnish the paper, run the copies, address the envelopes, fold and insert the enclosures, and so on. They will do any one phase of reproduction work or the entire job.

If the office does not have adequate duplicating equipment, the secretary may be required to investigate the services offered and the rates charged for commercial reproduction, to place the order, and to supervise the completion of the work. She must keep well informed as to new developments in the duplicating field, and she must be constantly looking for better ways of reproducing the work that comes out of her office.

Gelatin And Fluid Process Master Copies

PREPARING THE MASTER COPY FOR GELATIN AND FLUID DUPLICATORS Since the gelatin and fluid duplicating processes are based on the same fundamental duplicating principle, typewritten master copies are prepared in a similar manner. The major difference is that in the gelatin process the master copy is placed back of the carbon thus producing a positive carbon copy on the master sheet. In the fluid process, the carbon is placed back of the master sheet, and it produces the impression read in reverse on the back of the master sheet.

Although the master copy can be prepared on regular bond paper, the best results are obtained if special paper manufactured for this purpose is used.

Since the gelatin process requires a positive copy on the master sheet, special hectograph typewriter ribbon may be used in place of carbon paper. Special pencils and ink in different colors may also be used for writing directly on the copy.

In the direct process only the carbon paper may be used. Items are traced, written, or drawn on the front of the master sheet with an ordinary pencil and are reproduced by the carbon on the back of the master sheet in reverse order.

Master unit sets are available for use with the gelatin and fluid duplicators. In these sets the master copy sheet and the carbon paper are joined by a perforated top so that the typist does not need to assemble them. There is a tissue paper between

Special-purpose stencils are also available, such as four-page folder stencils, map stencils, newspaper-column stencils, handwriting stencils, and labeling stencils (for use with sheets of perforated gummed labels). Stencils are produced in legal size, letter size, and note size. Each brand carries full instructions on the stencil box or elsewhere. To obtain the best results, read and follow the instructions carefully.

Some stencil manufacturing companies also maintain a consulting service. They will prepare special dies and forms to suit your requirements. They will be glad to help you with your duplicating problems, and you should avail yourself of their services.

The coating on some kinds of stencil sheets may deteriorate with age, heat, or humidity. For this reason it is advisable to guard against overstocking. Stencils should be stored in a cool, dry place for protection. Weight should be kept off stored stencils; it is best, therefore, to store the boxes on edge rather than flat.

TYPEWRITER KEYS FOR STENCIL TYPING Typewriter keys must be absolutely clean to get clear, sharp copy by stencil duplication. It is usually necessary to clean the keys after the typing of each stencil because they may fill up with some of the stencil coating. Such letters as "e" and "o" should be watched carefully. It may be necessary to clean them during the course of the stencil typing, especially if the type face is elite in size. Liquid type cleaner should not be allowed to spatter on the stencil sheets nor should a stiff brush come into contact with the coating; either may damage the stencil sheet. A stiff bristle brush is recommended.

TYPEWRITER PLATEN FOR STENCIL TYPING The typewriter platen plays a vital part in the quality of the stenciled copy. The platen should be smooth and even and neither too hard nor too soft. A platen that is too hard will cause the circular letters to fall out, the punctuation marks to make vivid polka dots in the copy, and the underscore key to make ribbons of the stencil sheet. Every platen hardens with age and may eventually become too hard for stencil typing. A platen that is too soft will result in shaded copy, and even an excess of ink will not bring the copy out clearly.

Difficulty may be encountered in typing a good stencil on a noiseless typewriter because the force of the stroke is controlled on this type of machine for silencing purposes. Sometimes this problem can be solved by putting one, or even two, extra backing sheets behind the stencil. A much harder platen can be used for stencil cutting on a noiseless typewriter than on a standard one.

PREPARING THE GUIDE COPY Until you are experienced in typing stencils, you should prepare a complete guide copy, accurate in content and layout.

Set up the copy on the paper of the size that will be used in running off the copies. Mark on the sheet the limitations or boundary lines shown on the stencil. Any copy typed outside the vertical boundary lines, which provide for a 7-inch line, will not print when the stencil is run.

After clearly indicating the boundary lines on the model sheet, indicate the positions of all special illustrations or folds so that the typing copy can be adjusted to their location. Then type in the copy to be reproduced.

After the guide copy is completed to your satisfaction, check it carefully with the original copy. Many mistakes in duplicating work can be traced to the omission of this step. The secretary prepares an attractive model and types the final stencil from it only to discover that she has copied an undiscovered error. *Always check the guide copy with the original material before starting to type or draw the stencil.*

PLACEMENT OF COPY ON THE STENCIL There are several methods to indicate placement of the copy on the stencil. One is to lay the model on the stencil and jot down the line numbers and spaces for each margin and indention according to the scales printed on the stencil. Another method is to lay the model directly under the stencil sheet and mark the places on the face of the stencil, using a very soft wax pencil, correction fluid, or a ball-point pen and India ink.

Some duplicating machines permit an adjustment of only about one inch to raise or lower copy on the duplicated sheet. Consequently, it is necessary to place the copy carefully for adequate top and bottom margins.

INSERTING STENCIL IN TYPEWRITER After determining the placement of the copy, you are ready to insert the stencil into the typewriter. Follow the instructions provided by the manufacturer or distributor of the stencils you use in order to get the best results. If there is a sheet of wax paper between the stencil and the backing sheet, remove it because it was placed there only to preserve the moisture of the stencil.

If the brand of stencil you use calls for a soft tissue cushion sheet or a coated sheet, insert the auxiliary sheet between the stencil and the backing sheet. The coated cushion sheet should be placed in the assembly with the shiny or coated side up. Be sure this sheet lies smoothly and is even with the edges of the backing sheet. Replace the stencil sheet over it. Insert the stencil in the machine with the backing sheet toward you. Hold the bottom edges of the several sheets together firmly while rolling the stencil into the typewriter. If the ends are not held together, the stencil may wrinkle.

The next simple, but important, step is to set the ribbon lever for stencil. If you fail to do this, the letters will not stencilize completely through the stencil; only a faint, ragged outline will be reproduced. If the fact is discovered early on the page, you should be able to go back and restrike the keys and still get an acceptable stencil. It is almost impossible, however, to go over an entire stencil and achieve exact alignment on every letter.

TYPING THE STENCIL Great speed in typing a stencil is neither essential nor desirable. Too fast typing on a stencil results in uneven copy. Slow, meticulous, letter-by-letter stroking with a rhythmic, even, staccato touch is the best. Remember to strike the comma, the period, quotation marks, and underscore key with a lighter touch and to use a slightly heavier-than-normal touch on compact letters such as the "w" and "m."

Stop at the end of each paragraph and proofread it. See if the typewriter keys are pushing the coating aside properly so you have clear, even stencilized openings. See if any keys need cleaning or if some are making holes in the stencil. Do not roll the stencil backward any more than is absolutely necessary. There is always a chance that the stencil may

wrinkle or tear. When it is necessary to roll it back, hold the ends firmly.

MAKING CORRECTIONS ON STENCILS The making of corrections on stencils is a time-taking and painstaking process requiring a light, deft touch. A correction fluid is painted on the error to fill up the cut portion and to produce a surface on which the correction may be typed. To make a good correction, first smooth together the edges of the error by rubbing gently with a glass burnisher or the curved edge of a paper clip. This eliminates most of the opening made by the type or stylus. *Important:* this step is not necessary on some types and brands of stencils. Before making a correction, you should note the directions printed on the stencil box for the particular type and brand of stencil you are using.

If the stencil is in the typewriter, turn the stencil forward so that the line is clear of interference. By lifting the stencil sheet from the backing sheet at the side, the fluid applied will not go through the openings and adhere to the cushion sheet or the backing sheet. To avoid such penetration when the correction is being made on the desk, hold the stencil up while painting on the fluid.

The correction fluid should be almost as thin as water for best results. The brush should be wiped on the mouth of the bottle or on a piece of paper to remove all excess fluid. Only a very thin coating of the fluid should be applied to the error—just enough to cover the opening—the less fluid the better as long as the opening is entirely covered. Use a single vertical stroke of the brush for each character. Poor corrections are usually caused by the use of *too* much fluid or *too* thick fluid. Thickened correction fluid can be thinned with a commercially prepared thinner sold by the correction fluid manufacturer.

The correction fluid should set about half a minute after it has been applied. Test it with the finger for dryness before realigning the copy in the typewriter. The correct letters can then be typed *with a normal or slightly lighter than normal touch.* If necessary, make a second light stroke.

Correction fluid should be handled with care because it cannot be removed from clothing. It should never be used over the writing plate of the electrically lighted drawing board

for handwork on stencils. To avoid evaporation, it should be kept tightly corked when not in use.

When a stencil is replaced in the typewriter for making the correction, adjust it carefully for position and then take in two fingers the typewriter key that is to be struck and lightly press it to the stencil. This makes a slight impression in the fluid and indicates whether the alignment is exact or whether further adjustment is necessary.

After final removal from the typewriter, the stencil should be examined for scratches, unnecessary marks, or holes. All of these should be covered with correction fluid. If other blemishes show up after the stencil is on the duplicating machine, paint them out with correction fluid.

PROOFREADING THE STENCIL Every stencil should be read after it is taken from the typewriter even though it was checked paragraph by paragraph while being typed. Accuracy is paramount in duplicating work, for numerous copies are circulated.

If the proofreading must be done alone by the secretary, the stencil should be read back phrase by phrase to the guide copy, assuming, of course, that the guide copy has been checked with the original. The safest method is to have another person read aloud slowly from the guide copy while you check the stencil, holding it up to the light, or from the copy that offsets onto the cushion or backing sheet. Circle each error conspicuously so that it can be located easily when correcting.

PATCHING STENCILS It is surprising the amount of patching and rearranging that can be done on a stencil by a careful secretary. This salvaging work can be done before or after the stencil has been run on the duplicating machine. A collection of extra backing sheets and a supply of spoiled stencils that have not been run are necessary for patching and rearranging. If there is margin enough, at least 1/8 inch, to which a patch may be attached, any section of a stencil may be removed and a new section inserted. Words, phrases, paragraphs, signatures, dates, and so on, can be changed in this manner.

The correction or new material to be inserted is typed on an unused section of a spoiled stencil sheet that is still attached to


A. George M

ILLUMINATED STENCIL DRAWING BOARD

The copy is placed between the illuminated glass surface and the stencil and is then traced with a stylus. Lettering guides and additional styli are placed convenient for use.

almost invisible after the fill-ins are made. They can also be used to indicate folding, cutting, or stapling positions.

HANDWORK ON STENCILS The drawing of lines, forms, illustrations, hand lettering, and other artistic work on stencils requires the skillful use of styli, lettering guides, screen plates, and the illuminated drawing board.

The selection of the correct stylus is very important. In general, the wire-loop stylus should be used for solid-line work and signatures, wheel stylus for charts, graphs, and ruled forms, ball point for fine detail work, and a lettering guide stylus for lettering.

DUPLICATING INSTRUCTIONS After the stencil is cut, proofread, and completely corrected, it is ready to be sent to the duplicating department. It is the secretary's responsibility to order sufficient copies, to designate the kind of paper to be used, to give instructions on the delivery of the

final copies—when and to whom—and to indicate whether the stencil should be saved for future use. There is a printed form at the top of some stencils where this information may be recorded. Otherwise it is necessary to write the complete details on the blank portion of the stencil stub or on a separate sheet and attach it to the backing sheet with a paper clip. If possible, attach a sample of the kind of paper on which the stencil is to be run.

RUNNING OFF THE COPIES There are a number of different models and makes of stencil duplicating machines in use in business offices. A detailed instruction booklet accompanies each machine describing how it should be operated. If you will study this instruction booklet, you will be able to operate your machine satisfactorily. If additional help is needed, call on the company servicing your machine. These companies are always glad to assist users of their machines to obtain the best duplicating results possible.

After the stencil is run, there are several steps necessary to complete the job. The stack of duplicated copies is lifted out of the tray without joggling or straightening and laid aside to dry for an hour or two. Paper used in stencil duplicating is more absorbent than regular correspondence paper, but even so the ink will smear unless the sheets are allowed to dry before they are handled.

Special stencil wrappers made of absorbent paper stock are manufactured for use in filing stencils. When these wrappers are used, it is not necessary to clean a used stencil before filing. When the stencil is removed from the duplicator, it is placed in the wrapper, ink side up. The wrapper is then closed, and the entire surface is rubbed with a smooth hard object such as the bottom of an ink bottle or a paper weight. The ink from the stencil is absorbed by the wrapper paper and forms a protective seal against air, thus retarding deterioration of the stencil. A new wrapper should be used each time a stencil is re-used. The stencil is left in the wrapper and filed as you would file a regular folder.

When stencil wrappers are not used, the stencil should be cleaned. This may be done by placing the stencil between two sheets of newspaper and rubbing the surface of the news-

paper to remove the ink from the stencil. This process should be repeated until the ink is removed from the stencil.

A plan should be followed for identifying stencils for future use. When a stencil wrapper is used, one of the duplicated copies may be attached to the wrapper or the wrapper itself may be run through the duplicator before the stencil is removed thus reproducing on the wrapper a copy of the stencil. To avoid excessive handling of stencils, a numbering system is frequently used. The stencil and a duplicated copy are identified with the same number. The copies are then filed in a folder or punched and inserted into a notebook. Thus when a stencil is to be re-run, its number is obtained from the filed copy, and the stencil is located by number.

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QUESTIONS ON READINGS

1. Some firms have salesmen's order blanks printed with hectograph ink. The order form then becomes the duplicator master sheet. Explain the advantages of this plan and the purposes for which the order form master sheet could be used in the office.

2. The offset process can use either a metal or a duplimat master sheet. How is each of these master sheets prepared and what are the advantages and disadvantages of each?

3. What are some of the common business uses of the photocopying process? In what type of firms would you probably expect to find it being used extensively?

4. For what type of work is the automatic typewriter especially adapted? Under what conditions would it pay a business firm to use the automatic typewriter?

5. How would the addressing machine be used in each of the following types of offices or businesses:
   (a) Publishing company
   (b) Advertising firm
   (c) Payroll department of a large manufacturing company
   (d) Billing and shipping department of a wholesale firm

6. What are some of the various types of special-use stencils that are available?

7. What does slip-sheeting mean in duplicating work? With what type of process is it used, and for what purposes?

8. How do you make corrections for typographical errors on (a) master sheets for the gelatin or direct process duplicator and (b) the stencil for the mimeograph?

9. What are the various methods of indicating the placement of the copy on a stencil? Which do you prefer and why?

10. Why does stencil typing require a touch different from that used in ordinary typing for certain letters and characters?

11. What are some of the methods for identifying and filing used stencils so that they can be easily located for future use?

12. What kinds of business letters are frequently duplicated instead of individually typewritten? Why?

13. What are some of the methods by which a duplicated letter can be personalized?

14. What businesses in your community do commercial duplicating work?

DISCUSSION QUESTIONS

1. What are the major advantages and disadvantages of each of the following types of duplicating processes:
   (a) Gelatin process
   (b) Direct or liquid process
   (c) Stencil process
   (d) Typeset process
   (e) Offset process

2. Indicate which process of duplication you would recommend for each of the following projects, assuming that all types of duplicating processes are available for use.
   (a) 15 copies of a two-page bulletin to be sent to department heads
   (b) 4,000 copies of a form letter to be sent to prospective customers
   (c) 600 copies of a four-page house organ that is issued monthly and contains pictures and illustrations

(d) 10 copies of a sales analysis report that contains charts and a large number of tabulated figures (The report is to be sent to sales managers.)
(e) 300 copies of a notice announcing the annual contest to be sent to salesmen on the road
(f) 75 copies of a one-page notice illustrating the route to be followed to reach the annual picnic grounds (The notices are to be placed on bulletin boards thoughout the plant.)
(g) 5 copies of the secretary's report of the directors' meeting

3. Suppose that you were to mimeograph four pages of building specifications in straight single-spaced copy. After all the stencils were typed, you started to read them back and discovered that you had omitted the second line from the bottom on page 1. What would you do? What would you do if the mistake had occurred in the middle of any page?

4. Would you consider it unethical to use your company's duplicating machine and supplies to make several hundred programs for a meeting of your National Secretaries Association?

PROBLEMS

1. Show all your calculations in determining the answers to the following:

(a) If you plan to run a stencil-duplication job on 8½ by 11-inch paper and to use top and bottom margins of one inch, how many lines of single-spaced copy can you place on each stencil?
(b) If you use 8½ by 14-inch paper and allow a top margin of two inches and a bottom margin of one and one-half inches, how many lines of double-spaced copy can you get on each page?
(c) If you use 8½ by 11-inch paper and allow side margins of three-fourths inches, how many spaces are available in each line when a typewriter with pica type is used? when a typewriter with elite type is used?
(d) If your paper is 7¼ by 10½ inches and the side margins are one inch each, how many spaces are available in each line if your typewriter is equipped with pica type? with elite type?

2. Be prepared to demonstrate any one of the following steps in stencil work:

(a) Planning the placement of the guide copy on the stencil
(b) Typing the stencil
(c) Correcting errors
(d) Preparing a four-page folder

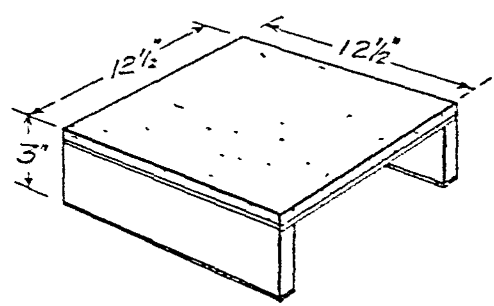
CHAPTER 24

OFFICE EQUIPMENT AND SUPPLIES

EVERY modern business office provides its staff with the kind of machines, appliances, and supplies that make for efficient and economical operation. Your employer will expect you, as a secretary, to know how to use his equipment and supplies efficiently and how to care for them to prevent waste. He may even ask you to take over the purchasing of office supplies when he learns that you have a real knowledge of his requirements. He will certainly expect you to use good judgment in the arrangement and care of your working area and of the materials entrusted to your care.

The Secretary's Work Area

Your desk will be your primary work area. It may be a single-pedestal or double-pedestal desk with a separate typewriting table, or it may be a typewriter pedestal or drop-head desk. Each type of desk has certain advantages and disadvantages. The one common criticism of most secretarial desks is that the typewriter is set 26 inches from the floor. For most people this is too low. When using a typewriter that is placed too low, the secretary finds that her shoulders and back of her neck become fatigued, her arms and hands slant at a difficult angle to the keyboard, and her wrists are held at an unnatural angle. If you find the placement of your typewriter causes you to tire easily, ask your employer to have a "lift box" constructed similar to the one illustrated.



Lift Box

Office Machines and Appliances

The use of the many diversified office machines has become so important in business that schools now give complete courses in their operation and care. The secretary will not be expected to be skilled in the operation of all of them (except, of course, the typewriter), but she should know the kinds of machines that are in use and the jobs they do.

A number of the commonly used office machines were discussed in detail in previous chapters. Among them were duplicating, stenographic, and mailing machines, which will not, therefore, be discussed in this chapter.

TYPEWRITERS

Certainly the most important office machine to the secretary is her typewriter. Its selection should be made upon the basis of careful analysis of the work to be performed. Several factors should be considered.

Type Size Needed. Type faces range in size from "jumbo," which is almost a half inch high, to extremely small characters, such as micro-elite. The two type sizes in most common use are elite and pica. The use of elite type is becoming more popular. Some surveys show that as high as 70 per cent of the typewriters in use in business offices are equipped with elite type. Many offices are using elite type with pica spacing (10 characters to the inch). Each type size has its advantages. If the typewriter is to be used extensively for duplicating work, an advantage in using pica type is that it reproduces clearer mimeographed, fluid, or gelatin duplicated copies. The smaller elite type has the advantage where the machine is to be used for filling in forms. For letters it is a matter of personal preference.

A number of different type styles are obtainable, such as Gothic, script, and italic. Gothic is generally referred to as the all-purpose type style; but where a machine is to be used exclusively for a special type of work, another style might be selected.

Carriage Length. Typewriters may be obtained with carriage widths ranging from 11 inches to 32 inches. The

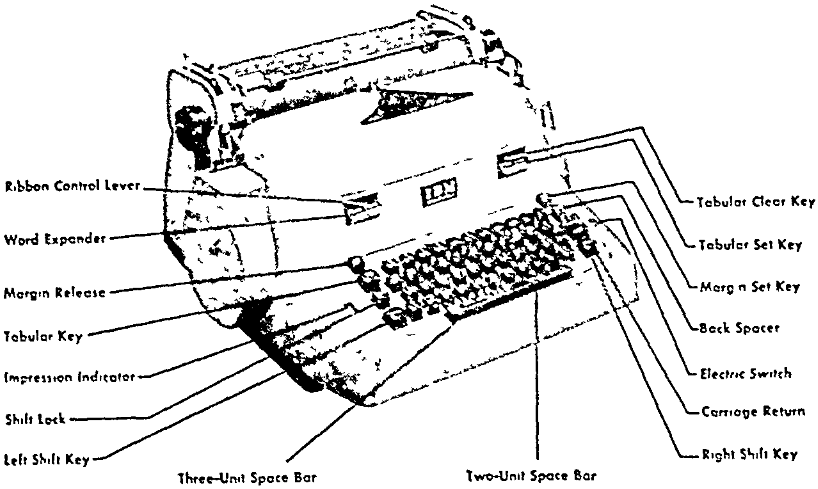
12- or 13-inch carriage is the standard width. By analyzing the type of work to be done, a secretary may find that a 14- or 16-inch carriage would be the most convenient width. The extremely wide carriage, such as the 32-inch carriage, would be used only for special work that requires use of wide sheets of paper and forms.

Platen. Platens may be obtained in a number of varying degrees of hardness, ranging from a very soft "quiet" platen to metal cylinders. The number of carbon copies generally prepared would determine the hardness of the platen desired. Extra platens may be obtained, and the secretary can conveniently change platens according to the work to be done.

Special Keyboards. There are several hundred different keyboards. There are keyboards for practically every language and for many different professions and businesses; such as keyboards equipped with special symbols for use in the fields of astronomy, telegraphy, air navigation, electricity, medicine, pharmacy, physics, engineering, chemistry, biology, meteorology, statistics, mathematics, and writing. By studying the need for special symbols and characters, the secretary can have her typewriter equipped with a keyboard that will expedite her work.

Portable and Noiseless Typewriters. The portable typewriter is not intended for business use, but the secretary who is expected to travel may be supplied with a machine of this type in addition to a standard typewriter for use in the office. In many offices a noiseless typewriter, which is standard in all other respects, is used. The noiseless typewriter has the advantage of being relatively quiet and therefore is frequently preferred when the secretary's desk is located near that of her employer.

Electric Typewriters. Probably the most important development in office machines, as they apply to the work of the secretary, is the recent increase in the promotion and use of the electric typewriter. All major typewriting companies now produce electric machines, and they are replacing standard typewriters in offices at a very rapid rate. While the electric machines are more expensive, they offer several advantages.



Castellano Studio

ELECTRIC TYPEWRITER WITH ADJUSTABLE SPACING

The use of the "Word Expander" and the three-unit and two-unit space bars permits the operator to justify the right-hand margin and thus improve the appearance and legibility of typewritten matter.

Since the pressure of each key is controlled electrically, they give a uniformly even impression and thus improve the appearance and legibility of the typewritten material. Up to ten legible copies may be made by merely adjusting the impression indicator. By using a metal platen and carbon-copy paper especially designed for multi-copy work, as many as twenty legible copies may be produced. A light touch releases each key and performs all manual operations, such as returning the carriage, tabulating, backspacing, and shifting for capitals. This increases production and makes typing less fatiguing.

The major advantage in appearance and readability that printed material has had over typewritten material is that in printed material the width of space allowed for each letter is regulated according to the width of the letter, and the right-hand margin is justified, that is, made even. Special electric typewriters are now being produced which accomplish both of these features. These machines are being promoted for the use of secretaries in executive offices where the appearance of special letters and reports is of highest importance.

The Vari-Typer. The Vari-Typer, which is an electric, semi-automatic typewriter, is essentially a composing machine for

CARE OF THE TYPEWRITER One of the tests of a good secretary is the care she gives the office equipment she uses. Proper care not only protects the mechanism and prolongs its life, but also makes it possible for the secretary to complete her work more efficiently.

EIGHT WAYS TO MAKE YOUR TYPEWRITER LAST LONGER

Do These Every Day:

1. Dust the exterior of your typewriter every morning and at the end of the day. Dust is the greatest enemy of the typewriter.
2. Dust underneath your typewriter every day so that air circulation will not carry dust particles that may lie on your desk into the inner workings of the machine.
3. Dust out erasure particles from type segments every day. In erasing, remember to move the carriage to the extreme right or left to prevent erasure dust from dropping into the machine and clogging it. Always brush away from typewriter.
4. Release paper-feed rolls during the day when not in use and always at night. This prevents flat spots from developing on the feed rolls and platen.
5. Keep the typewriter covered when not in use.

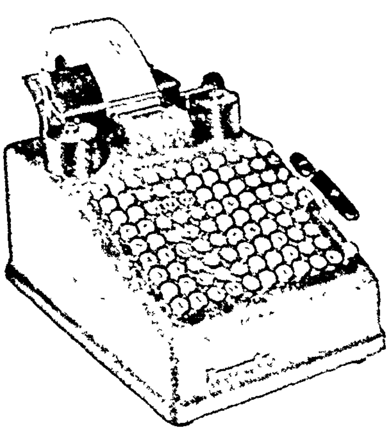
Do These Once a Week:

6. Clean the platen with a cloth moistened with denatured alcohol. If ink and dust are allowed to collect on the platen, it becomes shiny and does not grip the paper as it should.
   Never clean the exterior of your machine with alcohol as it will injure the finish.
7. If the platen is removable, remove it and clean the trough with a dry clean cloth.
8. Lubricate *only* the carriage rail or way. Never oil the type bar or segment. Use oil sparingly. Too much oil can prove harmful. Keep oil away from the platen and all other rubber parts.

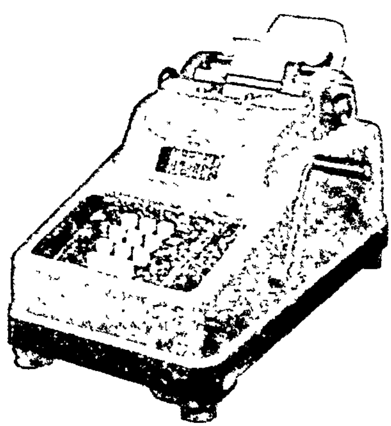
Reverse the ribbon direction and recheck to see if both spools turn. A two-color ribbon should be placed on the typewriter so that the color that will be used less will be at the bottom.

MATHEMATICAL PROCESS MACHINES Most people think that secretarial work does not require much arithmetical skill or ability. However, studies of what secretaries do show that they perform a large number of duties which require arithmetical computations, and much of the material with which they work is based on such calculations. Even the process of taking and transcribing dictation frequently calls for mathematical work such as addition or multiplication, or the calculation of percentages, discounts, and averages. Though all of the figures may be dictated, the efficient secretary checks their accuracy before submitting the letter or report to her employer. Study the calculating machines which are in your office, become familiar with the type of work which can be done best on each type of machine, and learn to operate each one efficiently. They will save your time and increase the accuracy of your work.

Adding Machines. The adding-listing machine is probably the most common type of calculating machine found in the office. The term "listing" means that the machine prints the figures on a paper tape, thus providing a record of the amounts



FULL KEYBOARD LISTING MACHINE



TEN-KEY LISTING MACHINE

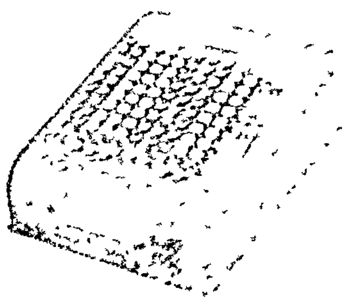
totaled, which can be checked to determine if any errors were made. Adding-listing machines are of two kinds:

1. Full keyboard machines with each column containing keys from one through nine
2. Ten-key machines on which the keyboard consists of one set of keys from zero to nine

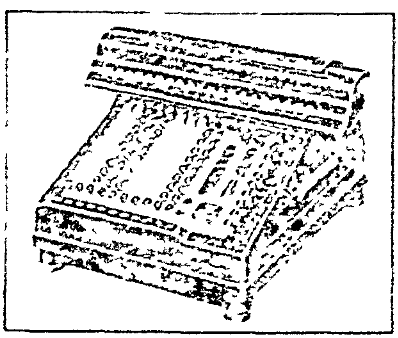
There are a number of different makes and models of adding machines. As the name implies, the major use for adding machines is for addition; however, they can be used for subtraction and for limited multiplication. They may be used also for division by using tables of reciprocals. The operation is relatively simple, and a brief study of the manual which accompanies each machine will enable you to use the adding machine with much efficiency.

Calculating Machines. Most calculating machines are nonlisting in the sense that there is no tape on which the individual amounts and totals are recorded. Totals are shown on the dials. These machines, which may be used for addition, subtraction, multiplication, and division, are of two types:

1. The key-driven type on which calculations are automatically performed by depressing the keys
2. The rotary type on which the depression of the keys must be followed by the turning of a crank on hand-operated machines or by depressing the motor bar if the machine is electrically operated



KEY-DRIVEN CALCULATOR



ROTARY CALCULATOR

Calculating machines may be used for all types of calculations, but the speed with which they perform multiplication and division makes them especially adaptable for complex calculations involving multiplication and division.

Bookkeeping and Accounting Machines. In general, bookkeeping and accounting machines are simply combinations or variations of adding-listing machines, calculators, and/or typewriters. All kinds of these machines, no matter how simple or complicated, operate on the principle of recording debits or charges, credits, and balances.

A special machine of this type is used for the preparation of invoices or bills, and for that reason it is known as a *billing machine.* On some models the invoices are prepared on continuous forms, and several copies can be made without handling carbon paper separately for each invoice. The type of billing machine in use in an office usually depends upon the information that a business wants to show on its invoices and the methods that are most convenient for obtaining and recording this information. In small offices, of course, the secretary may type invoices or bills on her regular typewriter.

OFFICE APPLIANCES As you wander through a stationery store, you become aware of the many devices for desk use designed to save time and provide greater convenience. For example, staplers not only save time in fastening papers together but also are more convenient to use than hard-to-pick-up pins.

There are few devices in an office that save more time than the common rubber stamp. In addition to the many stock stamps, such as "Air Mail," "Special Delivery," "Noted," "Answered," "Returned," "File," and "Payment Received," you may find that you can save your employer's time by having a rubber stamp facsimile of his signature prepared to be used on memorandums, notices, and printed forms.

A punch is a real necessity if loose-leaf records are kept. It makes it possible to insert any kind of paper or form in a ring binder. Paper cutters are convenient for trimming paper to the desired size. A number machine can be a protective device. It enables you to control the use of forms or pages in

organization the actual buying may be handled by a purchasing agent. In such an office the secretary requisitions what she needs from the purchasing department, describing the item and indicating the quantity desired. In a small organization the secretary is frequently entirely responsible for the selection and the purchase of supplies. To requisition or to purchase office supplies efficiently requires an understanding of the problems of buying, such as sources of information about office supplies, buying procedures, and stock control.

KINDS OF OFFICE SUPPLIES The typical office uses a surprisingly large number of different office supplies as indicated by the following classified list, which, although incomplete, is suggestive.

Paper and Stationery Supplies

Adding machine tape	File folders
Address labels	File labels
Appointment and memo pads	Letterhead paper, various sizes
Blotters—small and desk	Manifold or carbon-copy paper
Calendar fillers	Scratch pads
Carbon paper	Second sheets
Coin and bill wrappers	Shorthand notebooks
Envelopes, various sizes	Standard forms and blanks
File cards	Wrapping paper

Typewriting and Duplicating Supplies

Denatured alcohol	Correction fluid
Erasers	Correction pencil
Eraser shields	Duplicator ink or fluid
Long-handled brush	Duplicator master sheets and carbon
Ribbons	Duplicator paper
Scale for measuring type	Lettering guides
Typecleaner	Stencils
Typewriter oil	Styli

Miscellaneous Supplies

Ash trays	Dust cloths
Blotter corners	Glue, mucilage, paste, cement
Brushes	Gummed tape, cellulose tape
Clips	

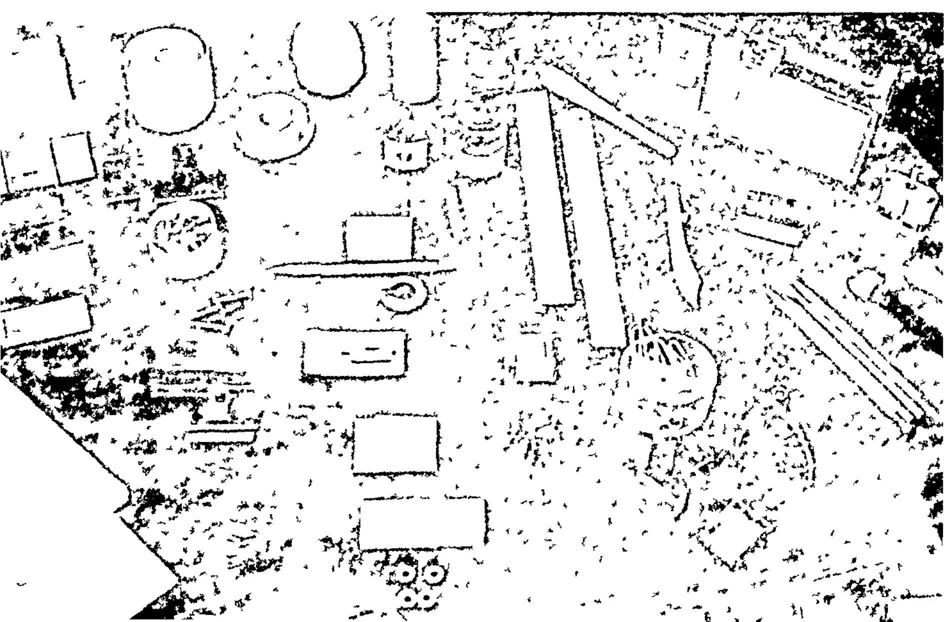
- Ink
- Ink eradicator
- *Machine tools—pliers, screwdriver*
- Paper fasteners
- Pencils—several colors
- *Pen points*
- Penholders
- Pens
- Rubber bands
- Rubber finger pads
- Rulers and T-square
- Scissors
- *Sealing wax*
- Sponges
- Stamp pads, rubber stamps, and ink
- *Staples*
- Tape measure
- Thumb tacks
- Twine

The variety of office supplies needed indicates that their selection, purchase, and care is a very important function.

SELECTION OF PAPER There is no one office supply which the secretary uses more frequently and in more variety than paper. Paper used in an office may be divided into a number of different classifications. It may be described according to its use, that is, letterhead paper, manifold (carbon copy) paper, or duplicating paper. It may be described according to its content, as rag content or sulphite content. It may

MISCELLANEOUS SUPPLIES

The secretary will use many office supplies. Most of those shown in this picture are essential for efficient work.



be described as bond paper or regular paper; or it may be classified by weight, as 16#, 20#, or 24# paper.

Letterheads. Letterheads are usually placed on bond paper, which may be distinguished by the watermark that appears on each sheet. The watermark is a trademark placed on better grades of paper in the manufacturing process. Many concerns have their trademark watermarked into their stationery. Bond paper may be rag bond (cotton fiber), sulphite bond (wood fiber), or a combination of both. Rag bond is the most durable and has the best appearance, but it is also the most expensive. One hundred per cent rag bond would be used only for important documents and for the engraved personal stationery of the chief executives. Sulphite bond is used for the bulk of office forms. Ordinary letterheads are generally printed on paper which has a 25 per cent rag and 75 per cent sulphite content.

Paper comes in various weights which indicate its thickness, such as 9#, 13#, 16#, 20#, and 24#. These weights are based on the weight of 500 sheets of paper, 17 by 22 inches in size. Thus a ream (500 sheets) of 8½" by 11" sheets of 20# paper would weigh 5 pounds. The common weights used for most letterheads are 16#, 20#, and 24#; 20# is the most common weight. A 9# letterhead bond paper is gaining wide use for air-mail correspondence.

A special letterhead paper is now manufactured, on which erasures may easily be made with a pencil eraser, but the ink offsets easily, and the paper is expensive.

Letterheads vary in size. Those most generally used are the standard business size, 8½ by 11 inches, and the executive or professional size, 7½ by 10½ inches. Other sizes include the half-sheet size, 8½ by 5½ inches, and the government correspondence size, 8½ by 10½ inches.

Carbon Copy Paper. Carbon copies are usually placed on manifold (lightweight) paper. It may be a bond paper, but it is light in weight and is generally 100 per cent sulphite content. Onionskin paper is a special type of manifold paper which is transparent and generally highly glazed on one side.

Envelopes. Envelope sizes are designated by numbers. A number 10 envelope would be 9½ by 4⅛ inches. Standard envelope sizes are shown in the following table.

LETTERHEADS		ENVELOPES	
SIZE	NAME	NUMBER	SIZE
8½ x 11	Business or Regular	6¾ 10	6½ x 3⅝ 9½ x 4⅛
7¼ x 10½	Executive or Professional	7½	7½ x 3⅞
8½ x 5½	Half-sheet	6¾	6½ x 3⅝
8 x 10½	Government	9	8⅞ x 3⅞

APPROPRIATE ENVELOPES FOR LETTERHEADS OF DIFFERENT SIZES

TYPEWRITER RIBBONS Typewriter ribbons are manufactured with varying degrees of inking: heavy, medium, and light. Very heavily inked ribbons make neat erasures difficult and also clog the keys so that frequent cleaning is necessary. Recently there has been patented a ribbon that has ink on the side which touches the paper and is plastic on the side which comes into contact with the keys so that they never become soiled with ink. Nylon ribbons have recently been made available. They are more durable than ordinary ribbons and provide exceptionally legible copy.

USING COLOR TO INCREASE EFFICIENCY In selecting supplies such as paper, cards, pencils, ink, and so forth, the secretary has at her disposal a very important tool—color, which will make her work more attractive, interesting, and efficient. Color invites attention. It may be an aid to finding and putting away material and identifying things of a kind. For example, all file copies might be made on blue manifold paper, all memorandums might be typed on pink paper, and a blue check mark might indicate that a letter is ready for filing.

One firm uses the following color system for carbon copies: carbon copies of general correspondence are made on yellow

When you are in the market for office supplies, tell the salesman of your exact needs. The actual product to be ordered depends upon many factors. For instance, the weight and grade of carbon paper that best fits a typist's need will be governed by the number of copies she customarily makes, her typing touch, the condition of her machine, and her personal preference as to blackness or grayness of carbon copies. Salesmen are trained to work out purchasing problems and usually can be depended upon to recommend the best brand for a particular need.

CHOOSING SUPPLIES There is no economy in the use of inferior supplies, and there is considerable danger in the purchase of unknown brands, lest they contain cheap materials, be off size, and consequently be of more expense in the long run than the better grades. Usually you get just about what you pay for. As you have undoubtedly learned, a cheap grade of carbon paper can be used only a very few times before the carbon coating is entirely gone. A carbon paper of good quality may be used for fifteen to twenty different typings and makes many more good impressions at one time than cheap carbon paper. Low-priced duplicating inks are made of poor quality oils and pigments. The ingredients often separate when the machine stands idle, causing the oil to seep through the mechanism. Such inferior ink also makes fewer copies than a high-grade ink.

In general, best results are obtained from supplies that are designed to be used together or to be used with specific machines. For example, it is wise to use the correction fluid designed for the particular brand of stencil being used.

There is no reason for shifting from one brand of supply to another so long as the one in use gives thorough satisfaction and is fair in price. On the other hand, supplies are constantly being changed and a product may now be made of entirely different materials and hence greatly improved since the last time you examined or tested it.

When contemplating a change in any brand of supplies, you should test a small amount of the proposed new product and check with other users, particularly if the quantity to be ordered is large. Get samples from several different companies

J. M. COLE CO.
DENVER
Purchase Requisition

REQUISITION No. B-211

Required for Department Office *Date Issued* Aug. 10, 195-
Advise Mr. Eller *on delivery* *Date Required* Aug. 25, 195-

QUANTITY	DESCRIPTION
2 gross	Superb Pencils, Grade F
1 gross	Superb Pencils, #3
2	Oak Desk Trays, Letter Size, #17
1 doz.	Star Transparent Tape, #2
1 M	Gem Clips

Approved by R A Brand Requisition placed by A. R. Williams

PURCHASING AGENT'S MEMORANDUM

Purchase Order No. 185 Issued to Office Supply Company
Date Aug. 10, 195- San Francisco

PURCHASE REQUISITION

This form shows the quantity and description of each product desired and the name of the department or office requesting the supplies. It is generally signed by the employer or his secretary.

Requisitions are printed in sets of two or more and frequently are assembled in pads to be kept in a drawer of the secretary's desk. In preparing a requisition, you should list certain details about the product, such as the name of the item, the quantity desired, a detailed description, and the name of the vendor, if necessary. One copy is retained by the secretary and the others are distributed as directed.

Requisitions are made out and presented as needs arise or are sent at regular periods to the purchasing department or the stock room. If requisitions are sent periodically, the secretary keeps a memorandum of the items to be included in the next requisition instead of trusting to memory.

METHODS OF ORDERING SUPPLIES If orders for office supplies are handled by the purchasing department, a purchase order form is used. The forms provide spaces for listing full information regarding the purchase.

If the secretary orders directly the supplies that are needed, she may use a purchase order form or she may order by letter

When the supplies are received by the buyer, they should be checked against both the purchase invoice and the copy of the order. This checking should include quantity, quality, brand name, number, size, color, weight, and price of each item. Occasionally an item will be omitted, substituted, or furnished in error, or it may be defective or damaged. Such items are annotated on the invoice for permanent record, and an adjustment is requested. The secretary should also check the mathematical correctness of all extensions and additions.

STOCK CONTROL Many items of office supplies are ordered infrequently. These should be watched as the supply is depleted. For instance, letterheads may be bought annually or semiannually, but it would cause considerable inconvenience if they were not ordered in time and the office had to operate without letterheads. It is a good policy to check the amount of supplies on hand at least monthly.

In some organizations an inventory of supplies is taken periodically and a copy is given to the accounting department. When this is done, the quantity of each item on hand is determined and written on a small ticket or inventory record form. This can be done a week or two previous to the inventory date if the record is attached to the supply in storage and any amounts removed from stock between that time and the inventory date are deducted.

The same orderliness and system applicable to other secretarial duties should be observed in the control of office supplies. When the secretary is responsible for issuing supplies to other employees, it is especially important that she set up a stock record for each item. Many secretaries keep this record on file cards or loose-leaf pages ruled in an appropriate form.

CARE OF SUPPLIES If you wish to determine how neat and orderly a secretary *really* is, examine her supply storage cabinet. Certainly a storage cabinet that presents an array of boxes, packages, and articles in complete disorder is no recommendation for efficiency. A well-arranged supply cabinet adds to office efficiency by saving employees' time in getting materials from the cabinet, in putting materials away, and by providing a constant inventory of supplies that need to be replenished.

9. In placing an order for paper, what descriptive facts should be indicated?

10. What are some of the factors that should be considered in the selection of (a) carbon paper? (b) typewriter ribbons?

11. Why should the secretary keep a file copy of each requisition that she makes for office supplies?

12. Which is the best method of ordering supplies from a local dealer—by purchase order form, by letter, or by telephone?

13. How can color be used as an aid in establishing office routine?

DISCUSSION QUESTIONS

1. What are some of the conditions you would observe to determine whether or not your typewriter is the proper height from the floor?

2. What recommendations can you make for changes in the standard keyboard for a typewriter that is to be used in an office where much of the work consists of typing numbers, including fractions and arithmetical signs?

3. What are the major advantages and disadvantages of the electric typewriter as compared with the regular typewriter?

4. In the selection of office supplies, to what extent should the service rendered by the seller be considered a factor?

5. You are aware of the fact that your assistant is in the habit of taking office stationery, stamps, and other materials for her own personal correspondence and needs. What is your responsibility and how would you handle the situation?

6. Suppose that the individual described in Question 5 is another secretary over whom you have no authoritative jurisdiction. Is your responsibility the same? What would you do?

PROBLEMS

1. Every secretary must know how to clean her typewriter and how to change the typewriter ribbon in an efficient manner. Practice these operations so that you can give an expert demonstration of each of them before your class.

2. Select one type of office supplies for special study. The following suggestions are made, but any other type may be used if your instructor approves.

(a) Carbon paper
(b) Carbon copy paper
(c) Duplicating paper
(d) Paper for letterheads and envelopes
(e) Typewriter ribbons
(f) Type cleaners

Secure all the information you can about the type of office supplies that you have selected. Secure samples and test them with the equipment that you are using for practice work in this course. Then, prepare a brief summary of the procedure you followed and your conclusions regarding the suitability of each of the products you studied.

3. Design a stock record card for the control of office supplies. (See the discussion on page 521.) Rule the form, type the headings, and fill in the information for one item of office supplies to show how the record would be used. After it is approved, add this form to your collection of materials for your secretarial handbook.

PROJECTS

A. Office Machines—Types and Sources. Additional equipment is to be purchased for your office. In order that you may be prepared to make recommendations, select one of the following types of office machines for special study:

(a) Typewriters
(b) Adding-listing machines
(c) Calculating machines
(d) Bookkeeping and accounting machines
(e) Small office appliances

For each machine secure descriptive literature and all available information pertaining to the following items: (Prepare a summary in tabular form.)

(1) Trade name
(2) Operations performed by the machine
(3) Name of manufacturer
(4) Name of nearest distributor
(5) Net price

Supplement your summary with illustrations of the various models.

B. Ordering Supplies. An examination of your supply cabinet indicates that a number of supplies should be ordered. Prepare purchase requisitions for the following supplies:

Requisition No. 101. 10 reams mimeograph paper, 1 dozen typewriter ribbons, 1,000 envelopes, and a supply of rubber bands.

Requisition No. 102. 1 gross pencils, 3 quire stencils, 500 file folders, 50 rolls adding machine tape.

You are to indicate whatever descriptive information for each item you consider necessary. Use the current date. Use prepared requisition forms, or prepare forms similar to the one shown on page 519.

CHAPTER 25

OFFICE ORGANIZATION

THAT charming, well-poised individual whom we think of as the ideal secretary acquires part of her composure from confidence that she knows *well* what is going on about her. She is "at home" in the office. Being "at home" in the office comes from an aptitude and liking for office work and from an understanding of office organization. The more you know about how your office is organized and what its exact functions are, the sooner you too will feel "at home" in your secretarial position.

It may seem to be an oversimplification to say that all businesses are fundamentally alike in their office organization. Probably you have visited many offices, and their outward appearances would tend to indicate that little similarity exists. It is true that offices do vary widely in their physical setup, in their size, and in the type of duties performed; but functionally they are fundamentally the same. In general, they all perform the same functions and exist for the same basic reasons, whether the office organization consists of two or several hundred employees. What are these functions and what should you know about them?

PURCHASING FUNCTION In any business concern, whether it be a small retail store or a large department store, a factory employing a dozen workers or a large corporation with thousands of workers on its payroll, a doctor's office or an insurance company, materials must be purchased to keep the business or office operating. This purchasing may be centralized in a separate department or office with a staff of several workers; it may be performed entirely by one individual who is a member of a general office staff; or it may be assigned along with other duties to one individual. No matter how large or how small the company may be, someone is responsible for purchasing the things needed to keep the business operating.

SELLING FUNCTION The fact that a business survives only if it is able to sell the goods or services which it produces is evidence that in every business organization there is a selling function, which keeps the wheels of business turning. In a manufacturing concern, it is the sale of the products produced; in an insurance company, it is the sale of insurance policies; in a law office, it is the sale of legal advice and counsel. The type of product handled and the method of distribution used bring about a wide variety in selling activities.

Since the demand for goods and services is created through both advertising and direct customer contacts, the selling function may be divided into two offices or departments: an advertising department under the direction of an advertising manager and a sales department under the direction of a sales manager.

In some businesses the responsibility for both advertising and selling is centralized in one department under the direction of one manager or department head. In other businesses it may represent a very small portion of the work performed in the office and be handled by one or more employees in the general office. The important thing is that, regardless of how organized, the selling function is being performed in all business organizations and a portion of the office time and effort must be devoted to it.

The Advertising Office. The function of the advertising office is to create a demand for the goods and services that the firm or organization has to sell. To create this demand, an extensive variety of advertising mediums may be used, such as newspapers and magazines, radio, television, outdoor signs, cards, direct mail, dealer helps, and packaging.

Although the work of the advertising department is fundamentally creative in character, there is more routine work involved than is commonly supposed. For example, after the idea for a magazine advertisement has been visualized and developed, the actual preparation of the copy, proofing of copy, and the final release of the copy contain elements that are highly routine and clerical in nature. The amount of routine work involved in direct mailing of advertising programs is evident. The supervision of this routine work in many cases is part of the responsibility of the secretary.

She must be able to supervise and do the exacting routine work, for the sales manager will probably delegate much of the responsibility to her; yet she must like change and fit into the promotional atmosphere of the office.

Contacts with the public are most important. The handling of customers and clients is the business of the sales office. Since the secretary is the intermediary between her employer and the customers, she actually is, in a sense, a sales representative for the firm.

CREDIT FUNCTION Eighty per cent or more of all business transactions are performed on a credit basis. It is obvious, therefore, that in almost every business there must be an established procedure for determining credit policies — to whom credit is to be granted, and for what amounts.

The importance of the credit function to a business can scarcely be overestimated. It must be carefully supervised to prevent too great an extension in the aggregate or in individual cases. Excessive costs in the granting of credit privilege and long delays in the collection of accounts are to be avoided.

Since the granting of credit and the collection of accounts are closely related to both selling and accounting, the credit function may be handled as an adjunct in either the sales office or in the accounting office, or it may be organized into a separate credit office supervised by a credit manager.

The Credit Office. The work of the credit office may be divided into two major functions: (1) approving requests for credit and (2) supervising the collection of accounts.

The granting of credit to new accounts involves the processing of credit applications. Accurate and up-to-date information must be obtained on each application. Part of this information is obtained from the application for credit, and part from other sources. Most firms utilize the services of credit-rating agencies.

In large communities, retail firms pool their credit information on individuals through retail credit associations, which check on references and make credit investigations. Some firms use the services of Dun and Bradstreet, a private credit

any customer. Delays and loss of records may cause serious embarrassment and create an unfavorable impression on the customer.

The Secretary in the Credit Office. The work of the secretary in the credit office may vary from handling only the special correspondence and appointments of the credit manager, to actually checking credit ratings, keeping credit records, and interviewing credit applicants.

People are very sensitive about their credit, and the secretary who comes in contact with credit applicants must be extremely tactful. If a delay in the granting of credit is necessary, she must explain the reason for the delay in diplomatic terms that the applicant can understand and appreciate. If credit must be refused, this too must be done tactfully so as to keep *the individual as a cash customer, if possible.*

If the secretary supervises the credit records, she must understand thoroughly how to organize them to provide immediate information.

The importance of absolute secrecy in all credit matters cannot be overemphasized. One careless statement regarding the credit of an individual may have a detrimental effect on future business.

ACCOUNTING FUNCTION In every business or organization, bills must be paid, payrolls calculated, records of customer and creditor accounts maintained, costs determined, financial statements prepared, cash accounted for, and tax reports submitted. These activities are generally centralized in the accounting office or department if the size of the business organization justifies it.

The Accounting Office. The accounting office is usually under the supervision of the head accountant or comptroller. The work of the office is generally divided into areas or divisions. The general accounting division may prepare financial statements, supervise the auditing, prepare and submit tax reports, pass on claims, develop the budget, and work out statistical reports.

The cost accounting division keeps detailed records of all costs, distributes these expenses to the proper production

items, and assists in determining the pricing of all items produced.

The accounts payable division keeps the records of all amounts due to and paid to individuals and firms, while the records of all amounts owed by and received from individuals and firms are kept in the accounts receivable division of the business.

The payroll division computes the payroll, supervises the paying of all employees, and submits social security and withholding tax reports.

The size and nature of the business determines how the accounting office is organized. All of the records may be kept by one or two individuals. In larger organizations a large staff of accountants, bookkeepers, clerks, and machine operators may be employed in each division.

The Secretary in the Accounting Office. To be an efficient secretary in the accounting office requires special aptitudes and interests. One must like to work with figures and share the accountant's high regard for absolute accuracy. An educational background that includes training in bookkeeping and accounting would be of great assistance in fitting into the work of the accounting office. If the secretary in the accounting department does not have this type of background, she should take steps to obtain it through evening school or correspondence courses. An understanding of accounting terms, procedures, and principles adds to her efficiency.

Since the work of the accounting office is fundamentally that of working with figures, a high degree of skill in the use of accounting and calculating machines is desirable. Typing of statistical and periodic financial reports requires a thorough understanding of tabulation and figure typing.

The secretary in the accounting office probably has fewer contacts with the outside public in the performance of her work than has the secretary in any other department. The work of the secretary in the auditing area may require some travel. She may, for example, be required to accompany her employer to various branch offices to assist him in the supervision of the auditing of the records maintained in these branches.

PERSONNEL FUNCTION Most people associate personnel problems with large organizations that hire several hundred employees. While it is true that you will probably find personnel offices only in large concerns, in every office there are certain personnel functions to be performed, regardless of how few the number of employees. Someone must hire employees as they are needed, must determine what type of work they are best qualified to perform, and must authorize pay increases and promotions. When the number of employees increases, this work is organized into a separate office or division, known as the personnel office.

The Personnel Office. The responsibilities of the personnel office vary from organization to organization; but, in general, this office has certain definite functions. These functions are hiring, placing, training, and promoting of employees.

One of the major functions of the personnel office is the hiring of employees. This involves the exploring of labor sources, the development and filing of application forms that provide pertinent information, the organization and conducting of personal interviews, and the administering of aptitude and proficiency tests.

Since individuals are hired to fill specific jobs, the personnel office must have a thorough understanding of all jobs in the organization. This involves job analyses to determine job requirements and to develop fair and equitable pay schedules for various jobs. Once an employee has been hired, he must be inducted into his job. This means seeing that new employees are informed of policies relative to working conditions, pay, retirement, and sick leave, and that they are introduced to their fellow employees and supervisors.

Training consists of two parts: (1) immediate training for the specific job to be performed and (2) advanced training in preparation for promotion. The immediate training may be provided by training "on the floor," or by what is frequently known as "vestibule schools." In the first case, employees are put in the actual jobs and are trained by a fellow worker or supervisor. When a number of employees for like jobs are being trained, short training periods of one, two, or more weeks are organized to provide group training.

Centralized Stenographic Department

In a centralized stenographic department, frequently referred to as a stenographic pool, all transcribing is done under the direction of a supervisor, who delegates the work, keeps production records, and checks the standard of the work performed.

example, all duplicating work is sent to a centralized department where skilled operators do all the duplicating for the entire concern.

Some of the advantages of centralization are:

(1) It eliminates duplication of equipment.

(2) It eliminates needless duplication of records. Since all offices use the same files, multiple copies for various departmental files are not necessary.

(3) It is generally more economical, for the work in these service departments is performed by specially trained clerks or machine operators under the direction of a competent supervisor.

These service departments relieve the secretary of a great deal of routine work. To make full use of them, the secretary should become thoroughly acquainted with the work they do and how they do it. By knowing, for example, the types of equipment available in the duplicating department, she can plan her duplicating assignments around the facilities available.

OFFICE ORGANIZATION PATTERNS The problem of co-ordinating the various office activities — purchasing, advertising, selling, accounting, credit, personnel — is that of office management. The exact organizational pattern followed is influenced by the nature and size of the business and by special conditions existing in each company. In general, most offices are administratively organized on one of the following patterns or combinations thereof.

(1) *Fully Centralized Office Management Pattern.* Under this organization plan, the responsibilities for all office functions are centralized in the hands of a single executive, the office manager. He reports directly to the president or the general manager, and he assumes responsibility for all office activities, irrespective of their nature or location or the division of the organization for which they are performed. Responsibilities are delegated by the office manager, but the office is not departmentalized to the extent of having department heads. All office personnel theoretically report directly to the office manager or to his assistants. Administrative assistants may be used, such as chief accountant, supervisors, and head clerks, but these positions are primarily for the purpose of delegating work. Such individuals do not determine policies.

(2) *Departmental Office Management Pattern Wherein Only Certain General Service Activities Are Centralized under an Office Manager.* Under this arrangement, it is the function of the office manager to furnish all departments with certain services, such as mailing and messenger, telephone, stenographic and transcribing, typing and duplicating, filing, and other such services. Under this pattern the office manager has little or no jurisdiction over office policies, methods, or personnel outside of his own service units. The various department heads, along with the office manager, report directly to the general manager, president, or some other designated executive.

(3) *Completely Decentralized Office Management in Which Each Department and Division Head Is Individually Responsible for All Activities Related to His Department.* Each department carries on all of its own office work, and each department head is responsible directly to the general manager or some other

designated individual. There is no one office manager, but each department head serves as the office manager for his department and assumes all responsibilities. Some centralized service areas, such as filing, may be maintained, but they do not represent departmental status.

(4) *Decentralized Office Management But with an Office Manager Designed to Co-ordinate and Facilitate the Office Activities of the Respective Departmental Executives.* The office manager, under this organization pattern, is primarily a co-ordinating official and has no control over the conduct of the office operations except in an advisory capacity. Each department manager assumes full responsibility for his department and reports through the office manager to the general manager or president. Centralized service areas may be maintained under the direction of a supervisor who reports to the office manager.

It would be impossible to predict accurately the organization pattern you may find in the office where you obtain employment. The important thing is that in any organization there must be certain lines of authority. If the secretary is to avoid friction and misunderstanding, she must observe these established authority lines. She must know the extent of her employer's authority, the various individuals to whom he is responsible, and in what capacity. This knowledge will enable her to save her employer much extra work and annoyance by routing matters that do not need his attention to the proper departments and individuals. In the employer's absence from the office, she will be able to determine what steps to follow in the handling of emergency business items.

WORKING WITH OTHER OFFICES While the saying, "It isn't what you know that is important; it is whom you know," may not be entirely true, it does contain some elements of truth. The secretary who has developed pleasant working relations with the secretaries and personnel in other departments can do much to expedite her employer's work. Innumerable illustrations could be cited where a secretary, through her friendly relationship with the secretary in another department, has been able to obtain special considerations for her employer that he himself could not have obtained. Therefore,

if you are to be successful in personal relations with others in your company:

(1) Learn the names of the personnel in other departments, their positions, the nature of their work, and the extent of their authority.

(2) Study the organization chart of the company.

(3) Learn the location of the other offices in the building.

(4) Study the organization chart of your particular office.

(5) Learn to know the secretaries in the other offices.

(6) Develop a friendly acquaintance with the people upon whom you are dependent for service, such as the switchboard operators, the machine repairman, the custodian who cleans your office, the mail clerks, and others. In fact, learn to know all of the people with whom you work daily!

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DARLINGTON, GEORGE M. *Office Management.* New York: The Ronald Press Company, 1942, pp. 211–222.

HICKS, CLIFFORD MILTON. *An Introduction to Business.* New York: Rinehart & Co., Inc., 1948, pp. 213–218, 257–272.

NEUNER, JOHN J. W., and HAYNES, BENJAMIN R. *Office Management and Practices.* Cincinnati: South-Western Publishing Company, 1947, pp. 26–62.

WYLIE, HARRY L., and BRECHT, ROBERT P. *Office Organization and Management.* New York: Prentice-Hall, Inc., 1947, pp. 55–78, 135–158.

QUESTIONS ON READINGS

1. What are the steps involved in processing a requisition through the purchasing office? Explain the reason for each step.

2. Why is the purchase order checked against the vendor's invoice?

3. How would you suggest that sources of information, such as catalogs, circulars, and price lists, be filed in the purchasing office?

reference sources from such magazines as *American Business, The Office, Office Appliances, Office Management and Equipment,* and *Personnel Journal,* and from books on office management. Confine your annotations to approximately one paragraph indicating the major points discussed in the reference.

2. Obtain an organization chart of an actual business concern or of a department within a concern. If facilities are available, duplicate the chart for distribution to class members. Be prepared to explain the details of the chart to the class.

3. Collect a series of forms used in a personnel department, a sales department, or some other department from a business concern. Organize the forms into a display. Under each form tell briefly its use.

4. You are asked to prepare a flow-of-work chart in processing the weekly payroll. You obtained the following information by observing the work in this department.

Each employee rings "In" and "Out" on a time card, which is kept in a rack near the time clock. The time cards are arranged in alphabetical order. On Tuesday of each week, a clerk gathers the cards from the rack and inserts new cards. The cards are turned over to a calculating machine operator, who figures the time and gross wage and indicates this information on the card. A tax clerk indicates the O.A.B. tax and withholding tax on each card. The cards are then given to two payroll machine operators according to letters in the alphabet. Clerk 1 handles all cards for names starting with A through H; Clerk 2, cards from I through Z. The payroll machine operator obtains the individual earnings records from the files and prepares the payroll journal, posts to the individual earnings record, and prepares the payroll check in one operation. The individual earnings records are returned to the payroll file. The checks are divided according to departments and delivered to the department manager for distribution to the employees. The completed payroll cards go to a clerk, who prepares new cards and files the old cards by weeks. Dismissal notices and authorization for placing new employees on the payroll go to the same clerk.

PROJECTS

A. Determining Letter Costs. The National Office Management Association has asked your firm to co-operate in a study of form letter costs. The form letters to be studied are individually typed letters in which the typist substitutes appropriate data in the letter. Mr. Simpson asks you to collect the data for him.

To obtain the data, you keep a production record of Miss Wright, the one typist in your office who devotes full time to form letter work. Your record shows that she produces an average of 320 letters per week.

The cost division of the accounting department provides you with the following cost information:

Miss Wright's salary	$42.00 per week
Expenses chargeable to Miss Wright's typing station:	
Supplies used (letterheads, envelopes, second sheets, carbon paper, ribbons, clips, erasers)	5.60 per week
Taxes (social security and state and Federal unemployment)	1.15 per week
Overhead (office space, light, heat, etc.)	2.90 per week
Typewriter cost (repairs and replacements) .	.70 per week

Prepare the report for Mr. Simpson. The report should contain the following:

(1) Total weekly costs for the typing station

(2) Cost per letter produced, with a breakdown showing the amount and percentage of the following costs attributed to each letter: salary, taxes, overhead, supplies, typewriter costs

(3) A circle chart showing the distribution of the costs per letter

B. Estimating Costs. It is estimated that, by shifting to an electric typewriter, Miss Wright's production (See Project A) could be increased 20 per cent. The accounting department reports that an increase in production of 20 per cent and the use of the electric typewriter would change the weekly cost chargeable to Miss Wright's typing station as follows:

Supplies used would increase 20 per cent.
Typewriter cost would double.
Other items would remain unchanged.

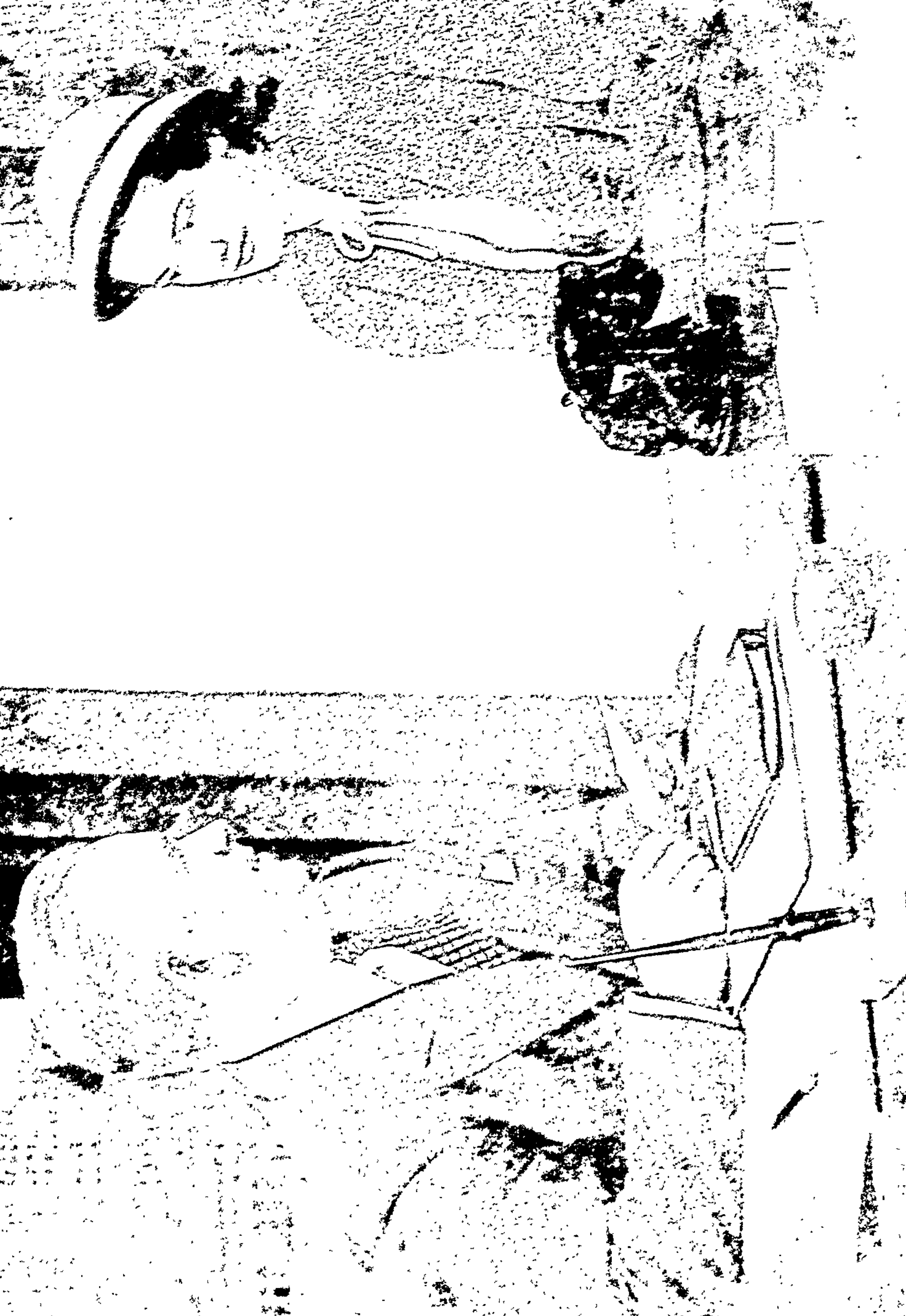
(1) Using these data, determine the per-letter costs if the electric typewriter were used.

(2) Prepare a bar graph that would compare the total letter costs using the electric typewriter and the standard typewriter.

C. Bringing Your Secretary's Handbook Up to Date. In completing your work in Chapters 23, 24, and 25, you have collected much material that will be of value to you as part of your handbook. Identify this material and file it in your handbook folders.

PART VII

YOUR SECRETARIAL FUTURE



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CHAPTER 26

SECURING A SECRETARIAL POSITION

THE goal of all study and practice for the secretary in training is the securing of a market for her trained services—a position. There is always a demand for good secretaries, but actually securing a position is a selling process—a very specialized form of salesmanship. Every secretarial applicant needs to know herself and her abilities equally as well as any salesman needs to know his wares. After a potential buyer for her services has been found, she must work out a well-planned selling campaign to convince that buyer that her services will best serve his needs. The better you plan your selling campaign and study the field, the more likely you are to find the job in which you will be most successful and happy.

Economic conditions affect the employment situation and dictate whether there is a great demand for trained workers or an excess of employable people over available positions. In the working lifetime of most of us, we are likely to encounter both extremes of conditions. It behooves us, then, to train and prepare to be among the "indispensables" when a retrenchment period comes and to make the most of the golden days of great demand for workers and high salaries for all.

The preliminary steps in planning your job-getting campaign are:

1. A detailed analysis of yourself in order to know exactly what you have to sell
2. A list of prospects with whom you might secure a position

ANALYSIS OF QUALIFICATIONS You will first want to make a searching analysis of your education, interests, abilities, skills, and experiences; that is, a complete self-inventory in written form. This will serve two purposes. It will help you discover your own selling points for your campaign, and it will serve as a basis for a personal data sheet that can be taken with you on interviews or incorporated into written applications.

Your self-inventory should cover the following points:

Personal information
Education and training (dates)
Work experience (dates and salaries)
Special abilities and accomplishments
References (names and addresses)

Personal Information. Every employer will want to know certain personal items about you. He will want to know your:

Full name	Date of birth or age
Complete home address	Place of birth (city and state)
Social security number	Status of citizenship
Telephone number	Height and weight

You must have a social security number when you are employed. If you do not have one, you will need to apply for one as soon as you are employed. Attached to the card is a stub, which you will want to file for safekeeping. You will probably carry your card to the interview, and you must show it before you will be placed on the payroll. It is very important that the number you give to the employer be correct, because the credits to your social security account are made by number rather than by name.

Education and Training. Schools you have attended, dates of graduation, diplomas received, degrees conferred, and a list of hours of credit in subjects relating to the position for which you are applying are necessary information on your self-analysis record. In addition to course titles, though, you should list specific office and secretarial skills and abilities. Give your speed in shorthand dictation and your transcription rate. Mention all specialized typewriting accomplishments in which you have had considerable training, such as straight typing, addressing, listing, stencil cutting, tabulating, typing carbon copies, or typing from rough draft. List separately the business machines that you can operate, stating your operating ability. Say, for example, that you have operation knowledge or limited experience on a machine, or expert ability if you have had considerable experience and can operate a certain machine well. However, overrating your ability may give your application a tone of superiority which may impress your potential employer unfavorably.

Work Experience. Your record of experience should be a chronological listing of all previous employment, whether or not it is office work. Your variety of experiences may be an asset, or your willingness to work at any honest labor may impress the interviewer. Employers are looking for people experienced in meeting various situations—many kinds of situations. You should list for each position the length of time you worked, the salary received, your promotions if any, and the reason for leaving the job.

Special Abilities and Accomplishments. Many positions are secured because the applicant has certain specialized skills, abilities, and accomplishments. Excellent penmanship, show-card-writing or hand-printing skill, art ability in stylus work on stencils, a good speaking voice, telephone experience, ability to meet people as a receptionist, ability to figure out difficult longhand writing, ability to read and write a foreign language, special aptitude in English composition or original writing, or specialized training, such as science or home economics, may be just the special qualification that will prove important in obtaining your position. Every detail that might in any way have a bearing on specialized types of secretarial positions should be listed.

The honors that you have attained, the organizations with which you have been affiliated, and the offices you have held will indicate to an employer your leadership and executive ability. Sports in which you have participated or hobbies that you have followed during the course of your education may indicate the condition of your health or the diversity of your interests.

References. Last, but far from least, in your list should be the names of people who know you well enough to be willing to recommend you. These should be chosen with care to be certain that they have value both to you as an applicant and to the employer who is seeking to know more about you or to substantiate your statements about yourself. The employer may wish to check on your training, your character and personality traits, and your experience. From four to six reliable references are adequate. Business people are best, and the longer and better they have known you, the better. If you have

PERSONAL DATA CONCERNING MARY STEVENSON

Personal

Address: 1401 Steward Avenue,
Los Angeles 15, California
Telephone: Fairfax 7943
Age: 21 years
Marital Status: Single

Place of Birth: Muscatine, Iowa
Nationality: American
Height: 5 feet, 5 inches
Weight: 118 pounds
Physical Condition: Excellent

Education

High School: Excelsior High School, Ramona Beach, 194-
College: Fairmont City College, Los Angeles, 2 years

School Honors Received and Offices Held

High School: President of Commerce Club
College: Secretary of Associated Women Students
Treasurer of Y.W.C.A.

Skills and Abilities

Shorthand dictation rate--120 words a minute
Typing:
Straight copy--75 words a minute
Stencil cutting--4 per hour (single spaced, letter length)
Addressing--At least 175 per hour
Tabulations and rough drafts--Considerable practice
Office Machines:
Can operate skillfully the following duplicating machines:
Mimeograph, Multigraph, Direct Process, and Rotary Gelatin
Have operating knowledge of: Comptometer and Burroughs Calculators, Burroughs Billing Machine, Addressograph (hand operated), Dictaphone (40 hours of practice), P.B.X.
Filing--Completed 40-hour course in Business Filing

Experience

One year in the Secretarial Training Laboratory at Fairmont City College, doing secretarial work for several instructors. The jobs included: dictation and transcription, cutting stencils and stylus work, preparing master copies, operating duplicators and other machines, and general clerical work.

References

Mr. L. O. Canfield, Head of the Department of Commerce, Fairmont City College, Los Angeles, California. Telephone: Garfield 7268
Mr. J. H. Jarvis, Assistant to General Manager, Pacific Southwest Railroad, Los Angeles, California. Telephone: Melrose 5976
Mrs. Evelyn Rapp (a writer), 798 Evanston Terrace, Los Angeles, California. Telephone: Hempsted 4568
Mr. Jason Sandiland, (a real-estate broker), 8560 Wilshire Boulevard, Los Angeles, California. Telephone: Bardshaw 6749

DATA SHEET

School Placement Service. The school you have attended for your secretarial training should prove to be one of your best sources of prospects, for most schools maintain an employment service for their graduates. Many employers have stated their preference for applicants direct from school training. An employer can secure accurate and reliable information about you from your school records and from those who have been responsible for your training. Possibly the people who have been working closest with you will be best able to analyze your abilities and fit you into the first position that is best suited to your qualifications. They will know, too, from past experience whether the position offers promotional possibilities or whether the opening is only a blind alley job. Naturally, your school wants to match prospects and jobs to the satisfaction of both. If the school maintains an employment department, especially if it is a large school where you are one of many students, you may have to sell your qualifications to the school employment office. Consider this and make the most of your school employment facilities.

Free Employment Agencies. Employment agencies are a good source of prospective positions. Some of these agencies make no charge for their services. Any person seeking employment may register without charge with one of the offices of the Employment Security Commission of your state. Registration includes a comprehensive interview by one or more persons in the office so that you may be properly classified according to your abilities, personality traits, training, and experience. In order to keep on their active list, you must communicate with that office regularly.

Other free employment services are maintained by certain civic and religious organizations. YMCA's and YWCA's usually offer free employment service. In some cities the Chamber of Commerce gives a great deal of help in securing employment. In some cities the secretaries are organized into a group that provides employment service to its members. Some agencies specialize in certain types of positions. Check on these and go to those that specialize in placing office employees.

Private Employment Agencies. The private employment agencies operate for profit and charge a fee for each placement.

Civil Service Announcements. You should also consider positions under civil service—the Federal Government and state and local governments. Examinations for various classifications of office work are given at regular intervals. Information about Federal examinations can be obtained from your local post office or from the United States Civil Service Commission, Washington, D. C. Announcements of state examinations are usually publicized in the newspapers, and information about municipal civil service examinations may be obtained from the local city hall. Register for every examination that fits your abilities and keep taking the examinations until you get a high rating.

Other Sources. The yellow section of the telephone directory provides a classified list of the local businesses to which you might apply. For instance, if you are interested in a position in an insurance company, you would find listed under *Insurance* all of the local companies.

When you are job hunting, you should become an avid reader of the daily newspaper and watch all news items that would give you a clue to a possible job contact. New businesses are constantly opening up or expanding, and items relating to jobs, changes, or expansions in business frequently appear in the newspaper.

If you have the money to spend on a personal advertisement, and if you are really clever or original and are able to do a good job at something different, try advertising for a job. Your advertisement must set forth your outstanding qualifications or nothing will be gained by the expenditure.

STUDY YOUR PROSPECTS

You should exhaust all possible means of getting the latest information on each of the firms on your prospect list and the name and the title of the person you should see in making application. Check with your friends and acquaintances on each one of them. Telephone to find out the name of the employment manager. In every way gather as much information as possible about the policies of the firm and of the employing person you will see before you take any steps in getting in touch with him.

A certain magazine advertised, using its name, for a secretary after two issues had been published. Of the two hundred

title. The exact title and name will do much to personalize your letter. (This information may be obtained from the switchboard operator of the company to which you are applying.) It is proper to write the letter directly to this individual, using the salutation "Dear Mr. Blank." Never use the salutation "To Whom It May Concern," as that immediately classifies your letter as practically a form letter. The personal element is entirely lost.

The written application may be either solicited or unsolicited. It may be solicited in that you are asked to apply in writing at the time you make a personal application; it may be unsolicited in that you are writing on your own initiative. Unsolicited letters may be written as "feelers" in the hope of discovering a vacancy or because the applicant has heard of a vacancy. You should make every possible attempt to ascertain whether a position exists or not before making any application. The same unsolicited letter form may be used for many different firms, although you will need to adapt it to firms having special requirements about which you know.

In answering a blind advertisement, you make your bid for attention in the dark. It is necessary that you be general in your response. You cannot write with entire freedom since you do not know who will read the letter. You should comply with all the requirements of the advertisement and answer every question, but you should guard against making any commitments that might in any way have unfavorable reaction when you learn the name of the person to whom you are writing. The following is a correct address form and salutation for such a letter:

Box 15
The *Times-Star*
Cincinnati, Ohio

Gentlemen:

The Application Letter Is a Sales Letter. Your application letter is definitely a sales letter. Like any other letter, it should:

Attract attention
Arouse interest
Create desire
Secure action

All this should be done briefly, in a short letter. A great deal of thinking but comparatively little writing should go into an application letter. Real salesmanship enters into the art of putting personality on paper, but your salesmanship efforts must never be obvious.

One employment director estimates that nine tenths of the letters he reads begin with "I want . . ." or "I am interested in . . ." Certainly an examination of the usual letter indicates that it is written from this viewpoint even if this first sentence is not used. The potential employer feels like saying, "So what?" He wants to know whether you have a service for sale that fits his requirements. Your first objective, then, in both the letter and the interview is to show him that you understand the requirements of the position and to demonstrate to him how your qualifications fit those requirements. If you adopt this attitude, your problem of enumerating a long list of "I did this" and "I did that" will be solved, for you are not listing items for the sake of the items now, but you are indicating how this background prepares you for the present opportunity. You are pointing out to him why you should be chosen from the long list of applications for the position, for you are showing him how your qualifications fit his needs.

The application might include the following:

1. A contact sentence (How you learned of the vacancy, how you acquired an understanding of the requirements of a secretary for his type of business, why you are writing).
2. An analysis of the requirements of the position. (Be sure that you are not telling him what he needs.)
3. An appraisal of your qualifications in the light of his needs (with or without a data sheet). You are trying to help him, not to ask him for something.
4. A salesmanship paragraph suggesting an appointment and definite action (with your telephone number).

If you use a data sheet, your letter may be shortened. However, your problem is the same: to show how the experiences listed have contributed to the background required for this position. For instance, you may summarize in the letter like this, "An examination of the enclosed data sheet will show that I am well prepared by training and experience

1401 Steward Avenue
Los Angeles 15, California
June 10, 195-

Mr. Paul C. Johnson
Reynolds & Thomas
136 Lincoln Avenue
Los Angeles 3, California

Dear Mr. Johnson:

The Placement Department of Fairmont City College tells me that you have asked for letters of application for the position of stenographer-secretary in your office. I understand that you want someone with highly developed skills in typewriting and shorthand as well as in the operation of the Dictaphone and duplicating equipment. In addition, you want to employ someone who works well with other people. Because I think that I possess these qualifications, I should like to apply for the position.

An examination of the enclosed data sheet will show that I have proficiency in shorthand and typewriting as well as in the operation of the machines you mention. Our advanced transcription class took office-style dictation and transcribed to meet office standards. We were taught that in business 95 per cent accuracy is not enough--that the letter must be actually mailable before it is acceptable. To supplement the usual skills, I have taken courses in business English and letter writing.

I have no difficulty in getting along with other people. I have participated in extracurricular activities and have held two elective offices in campus organizations. Living in a college dormitory for four years has given me considerable experience in getting along with other people and adjusting to different situations.

After you have analyzed my qualifications in terms of your needs and have checked my references, I should like very much to come to your office to talk with you about the position. I shall telephone you on Wednesday morning.

Sincerely yours,

Mary Stevenson

(Miss) Mary Stevenson

Enclosure

for secretarial work" or "The extracurricular activities described in the enclosed data sheet have prepared me to work harmoniously with other people and to lead others if given an opportunity." Do not let the data sheet do the entire job; show the reader how the different activities fit you for the vacancy.

The tone of your whole letter should be sincere, spontaneous, and natural. It should show a proper but not overemphasized appreciation of your ability. It should be neither boastful nor begging. Employers are experts in detecting insincerity. Be specific about the job you want and the thing you can do, but do not exaggerate. Do not include irrelevant statements, or the letter may look too much like an application blank, including too many details.

You might close your letter with a question, such as "May I have a personal interview?" or "I shall be glad to come for a personal interview just as soon as you can grant it. May I hear from you?" Sign your full name in well-written longhand with blue-black or black ink.

Make Your Application Letter Attractive. Your letter must be attractive to the eyes. It should be absolutely faultless and in conformity with the best rules of business letter writing. It should not be written in an extreme style that has not won general acceptance. Anything you say will be worthless if your letter contains a typographical error. You should scrutinize it many times and try it out on friends whose advice is sound. Sometimes an oral reading will help you improve it. It must not include flaws in spelling, grammar, punctuation, typing, balance, arrangement, spacing, placement, or wording. You should use a good quality of white bond paper of standard letter size. Your envelope should match the paper in quality. Letterhead paper should not be used in making an application, but your complete address should be typed in the heading.

THE FOLLOW-UP OF THE APPLICATION LETTER

You will get no response whatsoever to many of your letters, particularly those that were unsolicited. Consideration of the source of your information about the firm and whether or not you have reason to think there might be an opening will determine whether or not you send a second letter.

If you get no response, you might try again by following up your first letter with another copy of your data sheet. You might send with it a copy of your first letter, mentioning that you have written previously on a certain date or stating a special or related skill that might interest the employer.

You may receive just a form answer that says there are no openings. This response usually eliminates that prospect. You may receive only an application blank or a letter with an application blank. This is encouraging and you should fill out the blank with every possible effort to make it act as a sales letter for you. If possible, deliver the application blank in person. If instructions have been given to mail it back, mail it with a letter asking for a definite interview time.

If the response to your first letter is a request for an interview, this is what you have been seeking and your answer should be prompt. If a definite time has been specified, of course you will appear promptly at that time to make the best possible personal application.

THE INTERVIEW

The interviewing and hiring of employees in small businesses is usually done by the employer or the manager. In companies employing up to several hundred employees, it is often the job of a single employment manager, usually with the help of his secretary. In larger organizations employing several thousand people, employment may be handled by several executives, each meeting applicants for different types of positions. One usually handles the secretarial and office applicants. Those people who handle employment problems are making more and more intensive studies of selection of the very best people for the jobs.

In preparation for the interview, you should go back to the front of this book and reread the discussion of traits requisite for success in secretarial work. Although the interviewer wants to assure himself that you possess the necessary skills, he is primarily interested in your personality qualifications. He wants to know whether you have the traits discussed there, and your problem during the interview is to discuss those aspects of your background which indicate that you do. Put yourself in the interviewer's place. What would *you* want to know about the applicant?

Though the time you spend with the interviewer may be short, you will be giving him a volume of information about yourself through your general appearance, your voice, diction, posture, attitude, and personality, in your conduct and manner during the interview, and in the written material you present to him in the form of the data sheet or application blank.

It is a good idea for you to hold a dress rehearsal beforehand. Avoid wearing new apparel to which you are not adjusted. A new outfit is desirable from the point of view of good grooming and tailoring, but it may be a bit disconcerting to you if you have never worn it before.

During the rehearsal anticipate the questions he may ask. If he asks this question, how will you reply? If he asks that, how can you answer most effectively? If you have thought through the possible situations, you will be less likely to be caught off your guard during the interview.

Never take anyone with you in making a personal application. Go alone and plan your calls between 9:30 and 11:30 or between 1:00 and 4:00. Never try to see a businessman after four o'clock and seldom, if ever, on Saturday. Many firms have special days set aside for interviewing. In such cases, it is important that you ascertain these interview days and present yourself accordingly.

A card, a letter, or a note of introduction to someone in the organization is usually a means of getting a hearing. It may be a note on the back of a personal card or on a scrap of paper, but it puts you in a specialized group of applicants and usually puts you in contact with the one you want to see. It may say something like this, "This will introduce Miss Helen Emerson who has done some personal secretarial work for me and whom I can recommend most highly as a capable, loyal, and co-operative assistant. Anything you may do for her will be a personal favor to me." Or, "This will introduce Miss Helen Emerson who is calling on you at my suggestion to discuss a position with your organization."

If you have a card or a note of introduction, you might say to the receptionist, "I have a note of introduction to Mr. King from a friend of his, Mr. Irving, of the John Clay Company. May I see him?" If it is not possible to see the one you wish to see, try to get an appointment another day.

The Application Blank. Frequently, you will be asked to fill out an application blank before you are interviewed by anyone. The application blank is as vital a part of your application as is the interview. Many applicants are eliminated entirely on the basis of the way they fill out the application blank, or by the traits they show while filling out the blank. If you are given an application blank, the best thing to do is to sit quietly and read it entirely through before you ask any questions or write anything. Many questions that come to mind at first will be answered for you in reading the blank. If necessary, ask sensible questions so that you can fill out the blank accurately and completely.

Application blanks have usually been planned with care to make every single question on the blank serve a purpose for the interviewer. You may not know the motive for asking certain questions or the use to which the information will be put, but it is up to you to answer every question just exactly the way you are asked to answer it and to omit nothing. In all cases, draw a wavy line, or write the word "none," or make some comment in blanks for which you have no answer rather than to leave a blank or an unanswered question. Think before writing any answer. Be certain that you write only in the space designed for each answer. Be careful that you follow instructions. For instance, print your name when the instructions tell you to print; put your last name first if you are so requested. The way you fill out the blank reveals far more about yourself than you can ever realize.

The general neatness of the blank is important. Your handwriting is most revealing because there is always need for longhand writing in office work and no one in any office wants to take the time necessary to decipher a scrawly, illegible hand. It is a good idea to carry a pen, because you will probably write better with it than with one provided by the employment office. If later you are asked to take a letter, your interviewer is likely to be impressed by your readiness. The application blank to be filled in on the typewriter is frequently a part of the typing test in disguise, so you should make it represent your best effort.

If you study the blank both before and after you have filled it out and try to judge it and interpret it as an outsider

If there is a lull as you enter and it is apparent that you are to speak first, you may say, as a question, "Mr. King?" He will answer, "Yes," and then you can introduce yourself. From then on the conversation may be in your hands to explain your qualifications in your own words, or the interviewer may ask you direct questions about personal details and about your education, training, and experience.

Occasionally the interviewer may be busy as you approach his desk. Obviously you should wait quietly for him to recognize you. Sometimes there is an awkward moment in which he does not ask you to sit down. In case some time elapses without such an invitation, you may say simply, "May I sit down?"

If you have a well-prepared data sheet, you will save time and give evidence of your efficiency by *presenting it to the* interviewer at once. He can then get a fairly complete picture of your qualifications at a glance and can question you further on points in which he is particularly interested.

The Interviewer's Methods. The interviewer will ask questions and encourage you to talk in order to gain three types of information: your attitude toward work, your skills and knowledge of secretarial procedures, and your personality. The usual questions that an employer will ask you or will study on your data sheet are:

What is your education?
What is your special training for this work?
Where is your home? Do you live at home? Have you traveled?
Do you have any dependents?
What business experience have you had? By what firms have you been employed? Why did you leave them—particularly the last one?
Why do you want to work for this company? (What an opportunity to show that you know something about it!)
Whom can you name as references?
What salary do you expect?

In addition to these typical questions, he may include a few which are asked to throw you off your guard, questions such as "Are you engaged?" "Would you plan to stay with us permanently?" "Why did you go to such a small and rela-

tively unknown college?" Or "I understand that that university has a very radical attitude. What is your opinion?" "How much do you think it will cost you to live here?" He may make a derogatory statement about a former professor, employer, or even the man who sent you to him—just to see what you will do. It is not uncommon for an employee to recall a rather unpleasant experience during the interview after she has gone to work for an employer who turns out to be a very pleasant person.

Questions and conversation may seem to go far afield from the actual job and may relate to your interests, your hobbies, your family life, or your experiences or to his. Everything you say will reveal something to the employer.

An applicant was asked a question about sports. She replied, "I play golf. I enjoy it very much. There is nothing like a golf game to get me out of myself. I can go out to the golf course all out of sorts and come back feeling wonderful." "Oh," said the interviewer, "you are moody." And he was right. An apparently harmless question had revealed the applicant's worst personality defect.

The interviewer may be interested in someone who has had experience in a wide variety of situations. In that case your experiences of any type, such as traveling, working your way through school, or pursuing a hobby, will be revealing. He may be looking for someone who has executive and leadership ability. In that case your special interests, activities, honors, and offices would be of interest to him.

Do not be at all afraid of this purposeful questioning. A leading question should inspire you to give straightforward, complete answers without excessive conversation or unnecessarily revealing intimate personal details. Try during the interview to make a friend, whether or not the interview leads to a position for you.

If you have had business experience, it is quite logical that your previous employment will be a point of discussion in the interview. It is tactless and unethical for you to say anything detrimental about any former employer or firm for which you have worked, regardless of any personal feelings you may have. Always speak well of former employers. Nothing is gained by doing otherwise.

If you have had no actual paid business experience and are asked about your experience, do not say flatly that you have had *no* experience. You might say, "I have never been employed in business, because I have been in school, but . . .," and then stress the experiences you have had during training or tell of any special things you have done that will make you capable of handling the work.

You might answer the question, "What experience have you had?" with, "I took personal dictation for a year for one of my teachers and typed a great deal of copy for a book she is writing." Or, "I worked as part-time secretary for the past two years in college. I put in fifty hours a month taking dictation and typing for the head of the business department."

The Salary Question. The matter of salary is a delicate point in any interview. Many businesses have a salary schedule about which you can become informed before applying for a position. If you are asked what salary you expect and you are a beginner with no experience, the wise course is to be sufficently evasive that you do not commit yourself to a definite amount. You might say, "I am willing to start at your beginning schedule for a person with my background." If you do not find out the salary any other way, ask a direct question about it, but do not ask this question until the position is practically yours. It is not out of order, then, for you to inquire, "What is the starting salary for this position?" Or you could answer the salary question by stating "I shall be glad to accept whatever reasonable starting salary you suggest," and then add that you hope to prove your worth to them sufficiently in the future to gain increases.

You should know enough about the salaries in your area and what you could expect to receive to decide for yourself whether you would be receiving a fair wage to start. You need not accept the job if you do not think so. If you are not a beginner, you are prepared to meet the salary question more directly because you know your value and ability. You might state the last salary you had or the minimum salary you would accept if you have a definite feeling on the subject. The salary question, however, is delicate, and the wisest course is to know as much as you can ahead of time about the salary policies of

the firm and the possible salary for this position before you have to face the salary question.

The Interviewer's Check Sheet. Interviewers frequently use some kind of check sheet and immediately record their impressions of an applicant if they are interviewing many different people. A check sheet is also frequently used if more than one interviewer is judging an applicant.

Concluding the Interview. You will probably know quite definitely when the interview is coming to an end. If the interviewer has shown interest and in any way has encouraged you, but has not committed himself definitely about a position, it is permissible to ask directly, "When will your decision be made?" If this does not seem to be a fitting question, you might ask, "May I call back on Thursday at three?"

The interviewer may rise and that will indicate that the interview is at an end. You should rise too and thank the interviewer for his time. Do not offer to shake hands and do not delay when the time has come to depart. Let the interviewer terminate the interview; when he does so, make no attempt to prolong it. Leave at once, gracefully, pleasantly, and with dignity.

There is a growing tendency on the part of interviewers who are seeking employees for really responsible positions to request more than one interview and possibly for the applicant to be interviewed by more than one person. In all cases, the impression you make is the main point of consideration. If you are being interviewed by the same person a second time, he may be looking for qualifications that escaped him at the time of the first interview. If you are being interviewed by some other person, he is probably attempting to check his reactions with those of the first interviewer.

TESTS FOR SELECTING EMPLOYEES If you have gained favorable consideration, you may be asked to take some form of test. It may be merely a letter or two to ascertain your ability in shorthand and typewriting. It may be a more general test or one designed to detect a wide variety of abilities. The main thing to remember is that you know how to do these things and can do them quietly, confidently, and efficiently.

If you have taken a test letter and are asked to transcribe it, be sure to take all your belongings with you to the typewriter desk and keep them collected together. Tuck your gloves inside your bag; be certain you do not leave them on the interviewer's desk.

Many organizations have a battery of tests that are given to all applicants who are considered likely possibilities for employment. These firms almost always have some type of mental test. There is no last-minute preparation possible for such tests and no advice for the taking of them except to follow directions carefully and to proceed systematically and as rapidly as possible. In most cases the applicant will not complete the entire test. Some tests attempt to discover your personality traits or temperament. These usually indicate your general ability to work with others harmoniously in various types of situations. These, too, are tests for which no preparation can be made; they should be faced calmly and answers given as accurately and concisely as possible.

Tests, in general, are never used as a single basis for judgment in the selection of employees. The results of tests are used along with the results of interviews and an analysis of the applicant's records and reports from schools, previous employers, and references to gain a total impression from which the interviewer draws his conclusions.

PHYSICAL EXAMINATIONS More and more, physical examinations are required of an applicant before final acceptance. The firm sends you to its doctor and pays for the examination. Physical examinations are expensive and are given only to applicants receiving final consideration. Any type of physical unfitness is likely to be a hindrance to employment. If the examination brings out any definite physical weaknesses, the wise applicant will heed the advice of the physician and take all possible steps to eliminate that impediment to his success on any job.

THE FOLLOW-UP OF THE INTERVIEW The trend of the interview will indicate whether or not a follow-up letter is necessary. A thank-you note for the interview is most desirable. This sort of letter should be very brief and should follow the

11. What types of employment tests may you expect to take for an initial stenographic position?

12. Whom should you choose as references? Why should they be asked if they will recommend you?

DISCUSSION QUESTIONS

1. Should you list "twelve hours of shorthand," "ability to take dictation at 120 words a minute," or "ability to take office-style dictation and to transcribe neatly, accurately, and rapidly" on your application blank?

2. Should your qualifications be presented on a data sheet, or would the incorporation of these data into the body of an application letter give your potential employer a better idea of your ability to organize material?

3. Suggest ways in which you can obtain information about the company to which you are making application and about the person who will interview you.

4. How can you enumerate a long list of qualifications without sounding egotistical?

5. To what extent is the interviewer justified in asking questions about your personal life?

6. What should you do if it seems evident that the interviewer is ready to terminate the interview before you have presented your qualifications adequately? How do you know when he is ready for you to leave?

7. What would you do if an advertisement for a desirable position stated that a secretary over 21 was wanted and you were only 19?

PROBLEMS

1. Can you suggest situations in which each of the following experiences would be an asset in getting a position as secretary:

(a) baby sitter during college?
(b) camp counselor in summers?
(c) treasurer of student government?
(d) beauty queen in college?
(e) salutatorian of high school class?
(f) eighth-grade medal in history for best essay?
(g) Sunday School teacher?
(h) checker at chain grocery?
(i) summer in Europe?
(j) reared on farm?
(k) Phi Beta Kappa?
(l) president of college club of secretarial students?
(m) voted "most original" by senior class?
(n) part-time worker in registrar's office?

(o) waitress in summer resort?
(p) member of social sorority?
(q) editor of high school annual?
(r) advertising manager of college newspaper?
(s) sales clerk in department store?
(t) major in chemistry?
(u) member of production staff of Little Theater?
(v) certificate in shorthand and typewriting from National Business Entrance Tests?
(w) college champion in women's tennis singles?
(x) member of glee club?

2. Prepare a data sheet listing your qualifications.

3. Develop a prospect file. Decide upon the location in which you intend to look for a position, and use the available sources in that locality in setting up your file.

4. Write a situation-wanted advertisement for insertion in the newspaper in the community in which you plan to work.

5. Answer an advertisement for a secretary in the newspaper in the locality in which you plan to work.

6. With your instructor as interviewer, participate in a model interview before the class. Set the stage for the interview by telling the instructor whom he is to impersonate and the type of position you are seeking.

PROJECT

A. Interviewer's Questions. Assume that you are applying for a specific position and are asked the following questions. Unless a special form is provided for your answers, type your replies on a plain sheet of paper. In preparing your answers, try to analyze the motive behind the question.

(1) Why do you want to work for this company?
(2) What skills do you have?
(3) What salary do you expect?
(4) Tell me all about yourself.
(5) Do you intend to stay in the position permanently?
(6) Are you engaged?
(7) What hobbies interest you?
(8) What did you think of the election of ________________ as mayor last week?
(9) What books have you read in the past three months that interested you?
(10) How much will your living cost you?
(11) What experience have you had?
(12) Why did you go to ______________ School? They are a bunch of radicals down there.
(13) What kind of grades did you make in college?
(14) Why did (or didn't) you join a social sorority?

CHAPTER 27

MAKING GOOD AND GETTING AHEAD

"REPORT to work at 8:30 on Monday morning." Thrilling words are those to the applicant for a position! When the double-time heart beats of delight have decreased to normal, the first constructive thoughts are likely to be on how to make good on the job and how to get ahead.

THE FIRST DAY The first day in a new position and the first impression you make are tremendously important. That day may mark success or failure in keeping the position permanently. The first decision is to get a good night's rest before your first day. The first morning at best is bound to be difficult; you should be prepared to face it with the calmness that comes with plenty of rest.

PUNCTUALITY You will be on time that first morning and will continue to be on time every morning, regardless of the habits of others in the office. Being a *few minutes late in the morning and coming back late from* lunch may appear to some persons to be trivial items; but, in reality, this matter of punctuality is extremely serious. With many employers it is a strong influence in deciding whether or not a new employee is going to keep her position.

You are expected to be in your place and on your job during your specified working time and to be available to your employer when and where he expects to find you. Often, too, one person's lunch hour is arranged to begin when another's ends. If you are first in such an arrangement and you take more than your alloted time, you will be infringing on someone else's rights. Even if you go to lunch late, you are usually expected to return at the usual time and to follow a regular schedule. Someone once said, "With some girls, sixty seconds make one minute, and seventy-five minutes make one lunch hour."

A girl who is late in the morning is likely to be late just at a critical time. One secretary lost her position for being late

one morning when her employer arrived earlier than was his habit, because he was leaving town unexpectedly within half an hour. He needed to give his secretary instructions and dictation and to secure certain things he wanted to take with him, but she arrived at the office just in time to see him rushing for his train.

Another secretary was ten or fifteen minutes late in the morning, two or three times a week. She believed she was compensating for this lateness when she worked overtime much more than enough to make up the loss of time. She didn't realize that her employer was holding her back from increased pay because of this annoying habit of not arriving on time. Being late is an indication that a girl is not thoroughly interested in her work.

FIRST IMPRESSIONS While you are getting started, everyone in the office will be getting first impressions of you, just as you will be getting impressions of them. The very same things you considered important when you made your application for the position will continue to be important as you try to make good on the job. You can assume that you made a satisfactory first impression on your employer when you were given the job. Now you must make a satisfactory first impression on all of those with whom you work, and then see that that impression becomes permanent.

You will be under critical and detailed inspection that first day. Your dress, your grooming, and everything you do and say will be observed. It is a trait of human nature to be a little on the defensive against an outsider or a newcomer until that person has won goodwill and approval. There may even be a slight attitude of antagonism or opposition toward you as long as you rank as an outsider. That should not be disconcerting to you. If you understand it, you will be encouraged to make your associates like you and accept you as one of them. Remember that their approval is most important to your future welfare and happiness.

LEARNING THE WORK Your problem from the very first moment will be to learn as much as you can, about everything you can, as soon as you can. While you

are doing this, you will also be completing the specific tasks that are assigned to you. Learn all that you can quietly and without attracting attention. A person who makes a big fuss about learning something new often discloses an irritating nervousness, in contrast to one who seems to absorb information. The person who learns to proceed in an unobtrusive way gets credit for being alert and intelligent. The one who doesn't may get the reputation of being "dumb."

Executives as a rule are not particularly adept at explaining details of how to proceed on a job. They know what they want done and how they want it completed, but they are not always able, or do not want to take the time, to explain the routine or procedure to follow. If you are to serve your employer effectively, you must learn as much as possible about the organization as quickly as possible so that you can interpret his wishes and carry out his instructions without depending on him for elementary information. As soon as possible, learn the names of customers, the names of people with whom your employer deals, the telephone numbers that he is likely to want most often, the technical language of the firm, and the most frequently used phrases of your employer's dictation. The more you know and the more readily you have this information at your command, the more quickly you will become valuable to your employer.

Learn thoroughly the old procedure that you find when you take over a job. Later on you can determine whether there are reasons why these procedures should be followed strictly, or whether they can be improved. A new employee would make a great mistake to try to make changes in anything of importance while she is still a new employee. Her job of first importance is to learn the work as it is and to understand her employer. She should be very slow in initiating any new procedure without the consent of her employer. Some employers welcome new methods; others do not care to make changes. All of them prefer to get thoroughly adjusted to a new secretary before new procedures are considered.

The Office Manual. Many organizations have one or more office manuals or instruction sheets about office routine for the use of employees. A general office manual will usually

explain the organization of the company, the relationships of the various offices and departments, and general rules and regulations affecting all employees. Some contain instructions about the work of one department; others are manuals of instructions for specific types of work. Separate operating manuals are often available for various machines and equipment in the office. A good many firms have uniform rules about setting up correspondence or arranging specific kinds of typed material. If your office has these, you will spend many of your extra moments studying and thoroughly digesting everything in them that has a bearing on the work you have to do, almost to the point of memorizing them. At least you will refer to these manuals constantly until you have mastered every detail of the instructions.

The Office Files. Important background information can be learned from records and letters in the office files. The previous correspondence, both incoming and outgoing, will indicate the type of correspondence you can expect. It will also be an excellent source of terminology and technical language that will occur in your dictation. As you look through the files, you should observe, too, where and how each letter and record is filed.

Other Sources of Information. Almost every office has special types of records which may be helpful to the new secretary. These records may be scrapbooks or collections of clippings about the organization, the employer, or the product of the firm. For instance, an advertising manager may keep a scrapbook of his own company's illustrations, advertisements, and pictures, and perhaps one of his competitors' published material. The president of a company may have his secretary keep a scrapbook of newspaper clippings and other information pertaining to the history of the company. A public official will probably have all newspaper clippings about himself pasted in a personal scrapbook.

Many organizations have a paper or a magazine, known as a house organ, written by and about its employees and distributed free weekly, biweekly, or possibly monthly. Back numbers of these will tell you a great deal. Study them thoroughly, particularly for names and information about the

BECOMING ORIENTED TO A SECRETARIAL POSITION

The secretary studies files of correspondence, the office manual, and the advertising matter of the employing company. She learns to know the people with whom she works through reading the house organ.

people with whom you are working. You will find many personal items about each one. You will learn the policies of the organization and will soon begin to feel that you are really one of the group.

A very valuable source of information is the little advertising folders and brochures of your company describing and illustrating products and supplies that are a part of your employer's business. Take these home, read them for information, and practice for shorthand vocabulary, for sooner or later you are likely to get the same words in dictation.

Questions. You are quite likely to find that much of the office routine is not in written form or available in any way except by verbal explanation from someone else. You are fortunate if the information you need is in writing, but it is more likely that you will be told a mixture of facts and instructions. It will be your job to make notes of them until you have mastered or clarified them in your mind.

Begin to build your own desk manual just as soon as you acquire the necessary background of information about your new position. That may require from two to six months, depending upon the scope and the complexity of your duties. Some sections of the book, such as correct letter forms and mailing procedures, can be started within a very short time. If you are busy throughout every day, it may be necessary to do the bulk of the preparation after office hours. The first draft will be the most time consuming. After it is once written, the manual can easily be kept up to date.

One secretary who had developed a comprehensive desk manual showed it to the employer when she was discussing with him the matter of instructing her successor. Many months later he made it a point to call his former secretary to tell her that the new girl was quite satisfactory but that he felt the desk manual was largely responsible for the new secretary's success in taking over the detail work.

Form of the Manual. A loose-leaf book is the only practical kind to use for a personal desk manual, because in it additions and changes can easily be made. The book should be small enough to be kept in a desk drawer or between the book-ends on top of the desk but with a page size no less than 5½ by 8½ inches. A set of alphabetic index tabs is needed for the directory section and blank index tabs for the other sections.

Inasmuch as the desk manual is a book of permanent record, the contents should be typewritten, although it may be preferable to write the rough draft of some pages in longhand. Some of the models and forms to be included will probably exceed the loose-leaf page size. Each of these should be folded to no larger than page size and inserted in the book in such a way that it can be opened flat for easy reference.

Who's Who Directory. One section in the book will probably be a directory of the persons with whom the employer has dealings. The names should include:

1. Those with whom he frequently corresponds
2. Those to whom he frequently talks over the telephone
3. Those who call upon him
4. Key persons throughout his organization
5. Those who serve him, such as his lawyer; doctor, etc.

To build up the set of names for the directory, jot down each one as it comes to mind. Then go back and write out a small slip or card for each name, listing the following information:

1. The correct name of the person
2. The name of his company or organization
3. The address of the company or organization
4. The telephone number, if known
5. The salutation and complimentary close for correspondence, if different from standard ones
6. The way the employer signs his name, if other than the usual way
7. The identity of the person in relationship to the employer (relative, school friend, attorney, etc.)

The local telephone number is convenient to have at hand and the long distance number is very helpful in putting calls through quickly. Whenever a long distance number is learned, add it to the person's name in the directory. When a long distance call is placed without using the number, it is customary for the long distance operator to say, "That number is Tuxedo 8-9312 if you want to make a record of it." In large organizations each employee having a desk telephone has an extension or line number for intraoffice calls. These numbers should be included with the names of such employees.

There are always a few favored correspondents with whom the employer uses more friendly and intimate forms of salutations and closings. To know who is so treated and what forms to use is of real help to anyone unfamiliar with handling the employer's dictation. A person customarily addressed "Dear Paul" or "Dear P. J." does not relish receiving the formal salutation, "Dear Mr. Saunders."

To be of the most use, the manual should include generous cross references of affiliations and identifications. For example, if you have Mr. O'Fallon's name as sales manager of Acme Metal Company and Mr. Turner's name as advertising manager of the same company, make up a cross-reference slip for Acme Metal Company and list on it the address of the company, and the names of Mr. O'Fallon, Mr. Turner, and any others in that company with whom the employer has contacts.

Likewise, if Mr. Robert Engle is the employer's personal attorney, make out a cross-reference slip headed "Attorney—

Mr. Robert Engle." It is not necessary, although it is permissible, to type Mr. Engle's full address and telephone number on the cross-reference item. Those facts can be determined by referring to the card headed by the attorney's name.

After all of the original name and cross-reference slips or cards have been made out, sort them into letter groups, the A's together, the B's together, etc. Finally, type the names and cross references on the loose-leaf pages, using at least one page for each important letter of the alphabet. As each page is typed, check it for possible errors and then insert it in the book following the properly indexed tab page.

In many offices the "Who's Who" information is kept in the form of a card file rather than as a section of the secretary's desk manual. When this is done, however, there will probably be some names that should be placed in the manual rather than in the card file. For example, the names of other executives in the same company and the names of the employer's friends would probably be kept in the manual.

If the employer is a member of a large company, an organization chart showing the lines of authority and who holds each executive position is helpful to a new secretary in learning who is in charge of what. In some businesses a printed or duplicated organization chart will be available for the secretary's use. If not, the secretary can prepare one that includes the names and the positions of those persons with whom she and her employer have frequent contacts.

What's What of the Employer's Work. A special section in the secretary's desk manual is needed when the employer is a professional man with a succession of important clients, customers, projects, or jobs. A page should be given over to each, listing the title of the job, the work to be performed, pertinent data, terms, special procedures the secretary must follow, and so on. A list of the names of all of those persons connected with the job is also helpful. After the work is completed, the page should be transferred to the end of the section where it will be available for reference if need be. The title of this section could be "Clients," "Accounts," or some such term.

Explanatory Sections. The rest of the desk manual can be divided into topical sections explaining how to handle each of

Itemize the companies the employer prefers to use for local and out-of-town deliveries. List a schedule of charges for each, if available.

Include a model itinerary and schedule of available services, such as you customarily prepare for the employer when he travels. List the names of the persons with whom you talk at the various railroad offices and airlines to get information on time schedules or to make reservations. Tell where timetables are filed or kept. Point out any preferences the employer has as to traveling. He may prefer to travel in a roomette or a drawing room, or he may prefer flying to any other means. Include all items about travel that would save the employer the trouble of explaining them to a new secretary or that might save him inconvenience if he forgot to tell a new secretary.

Show a model expense report, noting the number of copies to be prepared, the distribution of those copies, and the necessary attachments such as receipted hotel bills, Pullman receipts, etc.

Office Machines and Supplies. You need not write a treatise on the operation of each of the office machines, but you should have on record the sources of help when the machines need repairs or services. Itemize the supplies used with each type of machine and tell where they are kept, how obtained, whether a signed requisition is needed, from whom purchased, brand name, quality, etc. A page on office supplies where the facts just meander down the page in no logical order will be helpful but not so presentable or businesslike as one on which the supplies are grouped logically.

Business Information and Reports. List in this section the reference sources you and your employer use—the libraries or the departments or the persons to whom you go for help and the various reference books in the office he relies upon.

Insert a model of each report that is submitted periodically. Be sure to tell the date of preparation or completion, the number of copies required, and their distribution. If a model report would be too bulky to insert in the book, identify the report and tell where a model copy can be found in the files.

It will not be necessary to set up the form for minutes since that will be in the minute book. Preparation work for regular

meetings should be itemized, however, and the deadline for final writing of the minutes be given.

Financial and Legal Duties. Use a separate page for each bank account you handle. Include the name of the bank and the kind of account, a model deposit slip, an explanation of the duplicate deposit slip system if used, the procedure followed in reconciling statements, the disposition of canceled checks, and where bankbooks and checkbooks are kept.

For petty cash explain the record-keeping system, where funds are kept, how the fund is reimbursed, and where past records are filed. Explain the system used in checking, approving, paying, and filing of bills.

Securities, real estate, insurance, and income tax matters should not be discussed in the desk manual if they are personal. It is better to keep a separate book for these matters.

Include models of each of the payroll forms prepared. Tell where to obtain pay envelopes or how checks are to be written. Describe the filing procedure for each of these forms. Set up a deadline schedule of when to do each payroll duty.

Any typed or printed legal form frequently used should be included. Show number of copies, distribution, and filing procedure. The name and the address of the notary public used should be listed.

Special Sections. The above sections cover the routine duties common to almost every secretarial job, but there will probably be an additional section or two necessary for duties peculiar to the employer's field of work. For instance, a sales manager's secretary would include a section on the personnel of the sales force, the credit routine, tracing an order from receipt to shipment, and so on. Explain each special duty and interest, and illustrate it if need be.

PROGRESSING ON THE JOB If you stay in your own little niche, doing only the work that has been assigned to you, you are quite likely to remain in that same position and at about that same salary indefinitely. It will be very much up to you to assume added duties and responsibilities, which will help you grow in value and ultimately gain promotion and increased pay.

Your first thought should be to do excellent work on each job you have to do. As soon as possible, you should begin to think of thoughtful extra things that you can do to make each job a little better than was expected. If you organize your work well, you will have the time and will see the occasions when you can offer to handle certain types of work that you know you can do well. Volunteer to do this whenever you can, yet learn not to try to assume more work than you can handle.

An employer appreciates the willing acceptance of additional responsibility by his secretary. The girl who is always willing to accept tasks that are not exactly hers and who is cheerful about doing extra work will be almost certain to have a permanent position. This does not mean that she should try to take over the work of others and consequently make herself thoroughly disliked or that she should make a doormat of herself by doing other people's work, but it does mean that she should be willing to accept responsibility.

There is one thing you must remember about working to get ahead. There are already others in the positions above you and they will resent any attempt you make to infringe on their territory or any signs they see of your having your eye on their particular jobs. You will never get along with someone who feels you would like to take her job away from her. Remember how much you would dislike anyone who showed signs of working to get your own job. Your effort to learn and study and increase your value must in no way be affected by any person's position above you. If you prove your worth, someone in the organization will undoubtedly discover you and promote you without your antagonizing anyone.

THE EMPLOYER'S PERSONAL WORK The more responsible the employer's position, the more of his personal work will devolve upon the secretary. An alert, efficient secretary realizes that by taking over the details of the employer's private work she assists him in concentrating on the details of his job. The secretary who takes care of the employer's personal files and correspondence and assists him with his outside activities and his private finances makes more of his time available for the vital business of his company and makes her services increasingly valuable to him.

Negatively speaking, the clock-watcher secretary resents doing any personal work for her employer. Such an attitude is always apparent to the employer and usually causes him to feel a lack of freedom in requesting personal services. The willing, helpful secretary, on the other hand, who remains overtime when necessary to complete personal work is liked, depended upon, and, most important of all, enjoys inner personal satisfaction. The real private secretary knows almost as much about her employer's personal business as he himself does. It is a position of trust—to be coveted.

Personal Services. A secretary's lunch hour is occasionally crowded with errands for the employer. His banking may be done at that time. Sometimes special trips to the post office are necessary. There may have been a request to take films to be developed or called for, or to exchange some merchandise for his wife, or to order flowers for a friend in the hospital. Ordinarily the employer will allow the secretary an extended lunch period when such errands are on the schedule.

Sometimes it may seem an imposition for the employer's wife to ask the secretary to address invitations or to type announcements for a club affair, for those requests always seem to fall when regular office work is heaviest. But it is the consensus among secretaries who have made good that extra-office duties are part of one's job and are to be done willingly, quietly, and efficiently.

The Employer's Private Office. Some men are naturally neat; others, naturally careless. If the employer is of the former kind, the secretary's task of keeping his office neat will be an easy one; but if he is of the latter kind, she will have a never-ending and, probably, a thankless task. A person doing creative work ordinarily has his desk piled high with all-and-sundry that he wants to keep or use. The accumulation just grows and grows. The secretary in an earnest effort to straighten up the place may "clean house" and be accused forever after of having lost this and that.

The personality and habits of the employer should be studied carefully before any serious house cleaning of his desk or office is started. If he is a possessive sort of person who wants to keep his things to himself, it is best to leave them alone. If he

is the careless type, the secretary can tactfully suggest a house-cleaning period once in a while. Such house cleaning may best be done when he is away for a day or two—if he will agree to it. The secretary might ask casually, "Do you mind if I go through the things on top of your desk while you're away?" or "I feel a house-cleaning spree coming on. Do you mind if I include your desk?" Forewarning the employer is the best procedure.

One of the little things that count in keeping an office habitable is to see that the ash trays are clean—both in the morning and at noon. Another is to dust the desks and the tables when they need it. In summertime and on windy days this may mean doing it more than once a day. The secretary may keep a clean dustcloth in her desk for the employer to borrow when he wants to indulge in some dusting himself. An occasional duty may be to see that a white towel is placed on the seat of the employer's desk chair when he wears a white or very light-colored suit to the office.

These personal services are in addition to the customary duties of seeing that the employer's desk is well supplied with stationery and office needs, such as pins, paper clips, ink, blotters, pencils, erasers, and postage stamps. The employer who has a fountain pen desk set naturally assumes that the secretary will keep that pen filled. The secretary is rarely told to take over these personal-service duties. She is expected to do the work on her own account, inconspicuously and promptly. They are not tasks for which she will be praised, but they do earn the silent goodwill of the employer.

Personal Publicity. Many employers have a prepared personal data sheet. This is most often used when seeking for positions, but the employer may submit one when applying for membership in a professional organization or he may supply one to a publisher for a biographical article. When the secretary has once been furnished with the employer's personal data sheet, she should see that several copies are always on file. The next time one is called for, it is merely a matter of bringing a file copy up to date. Frequently the secretary can do this herself, because she knows the activities and accomplishments of the employer.

Press notices that mention the employer or his activities should be clipped, identified, and filed. They can be rubber-

cemented into a scrapbook or mounted on individual letter-size sheets and filed in file folders. Many men are too modest to handle or supervise such a task, so the secretary should carefully watch trade journals and other pertinent publications for such material. If the employer is very much in the public eye, he may subscribe to a clipping service.

FUNDAMENTALS OF SUCCESS An employer is just as anxious to have you succeed as you are to be successful. Some of the questions he will ask regarding your work as a secretary will be:

Does she have the skill and the ability to hold this position?

Does she show initiative or does she have to be told what to do?

Is she resourceful in finding ways and means of accomplishing the seemingly impossible?

Is she alert, observant, and on her toes every minute?

Does she organize and plan her own work well?

Does she take responsibility from my shoulders?

Can she supervise and delegate work to others?

Do her associates like her and work harmoniously with her?

Am I proud of her because of her appearance, manners, behavior, and personality?

ATTITUDE TOWARD YOUR WORK Your attitude toward your work and your point of view come from within yourself, but you will have a difficult time keeping others from discovering them. Some girls enter the business world with the idea that they are merely marking time and earning a pay check until marriage comes along. This may eventually prove to be true, but certainly it is a bad idea to think of your work as if it is to be only temporary. You should believe that it is to be a life career. Take a long range attitude toward it. If marriage comes along, nothing will be lost by having tried to make a career of your work while it lasted. John Ruskin once said:

> We are not sent into this world to do anything into which we cannot put our hearts. We have certain work

to do for our bread, and that is to be done strenuously; other work to do for our delight, and that is to be done heartily; neither is to be done by halves or shifts, but with a will; and what is not worth this effort is not to be done at all.

WIDENING YOUR HORIZON After you have spent considerable time in learning all you can about your job, the company for which you work, and the product or services that it sells, you will have time to think of growing and widening your horizon in your present work, your cultural background, and your outside interests.

An intelligent secretary will grow with her position and with the firm and will keep pace with the expansion of the work in her office. She will need to grow mentally every day of her working life. If the time comes when she can not keep up with her employer, he will probably begin to look for a secretary who can. The secretary who continues to grow with the man for whom she works will have a job as long as she wants it.

REFERENCE READINGS

ABRAHAM, WILLARD. *Get THE Job.* Chicago: Science Research Associates, 1946, pp. 120–131, 170–186.

ALSOP, GULIELMA, and MCBRIDE, MARY. *She's Off to Work.* New York: Vanguard Press, 1941, 267 pp.

BUCHANAN, AIMEE. *The Lady Means Business.* New York: Simon & Schuster, Inc., 1942, pp. 86–187.

MACGIBBON, ELIZABETH. *Fitting Yourself for Business.* New York: McGraw-Hill Book Company, Inc., 1947, pp. 248–385.

SCOTT, LOUISE HOLLISTER. *Income Management for Women.* New York: Harper and Brothers, 1940, pp. 3–95.

SMEDLEY, DOREE, and ROBINSON, LURA. *Careers in Business for Women.* New York: E. P. Dutton & Co., Inc., 1945, 219 pp.

QUESTIONS ON READINGS

1. How can you learn about the organization of the company? the names of customers? the technical language of the firm? the preferences of your employer in matters of style? the mailing routine? the procedure for requisitioning supplies? the names of other office employees? the lines of authority in the office? the form for writing business reports? the products manufactured by the company? the form for preparing an itinerary?

2. Distinguish between a "learning" question and a "leaning" question. Give two examples of each.

3. Will you expect to be welcomed cordially by the other office workers of equal status with you? Why?

4. Some companies designate a sponsor to induct the new employee into his position. Why would this system be advantageous to the employee? to the other office workers? to the company?

B. Evaluating Office Manuals. Office manuals may fall into one of the categories listed below, or a particular manual may be a combination of several types.

(1) Examine, classify, and evaluate two office manuals that are actually used in business. Check each manual to see whether it contains the following items. (For your convenience in making the study, type for each manual a copy of the rating sheet given below.)

(2) After you have checked each manual, write an evaluation of it from the standpoint of the beginning employee, telling what changes you recommend.

I. Manual for general or company-wide use?
  - History of company?
  - Organization chart?
  - Policy of company-wide significance clearly stated?
  - Responsibilities of executives and supervisors clearly shown?
  - Procedures established by one division for the guidance of another division clearly stated?
  - Functions of departments serving entire company explained?

II. Departmental instruction manual?
  - Outline of procedures and routines applying exclusively to one department?

III. Job instructions?
  - Instructions applying exclusively to one job irrespective of department, such as a stenographers' manual?

IV. Employees' handbook?
  - Payroll deductions?
  - Timekeeping procedures?
  - Absences?
  - Vacations?
  - Lunch hours?
  - Rest periods?
  - Employee benefits, such as insurance, credit unions, etc.?
  - Employees' social program?
  - Suggestion system?
  - Smoking regulations?
  - Others?

C. Checking Your Development. At the beginning of the course (end of Chapter 2) you checked yourself on twelve personality traits necessary to the secretary. You then made a plan for improvement. In order that you may check up on yourself to see whether you are developing in secretarial personality, complete the check list a second time and ask a friend to evaluate you.

REFERENCE SECTIONS

SECTION A. BUSINESS LETTERS

This reference section is in the nature of a supplement to Chapter 7, "Arranging and Typing the Transcript." In addition to the information on styles of punctuation which is given in the topic on this page, this section includes illustrations of four letter forms (page 582 and 593), a tabular presentation of instructions for the arrangement of letter parts in the modified block and indented forms (pages 594 to 599), and illustrations of five envelope address forms (page 600).

Punctuation Styles. The body of a business letter is punctuated according to the rules of punctuation that apply to any kind of material that is written in sentence and paragraph form. There are different practices, however, in the use of punctuation marks at the ends of the lines in the other letter parts. These different styles of punctuation are known as close, open, and mixed.

The close or end-of-line style of punctuation is the older, more time-consuming style, which requires a period at the end of the date line and at the end of the last line of the inside address, a comma after the other lines of the inside address and after the complimentary close, and a colon after the salutation. The open style of punctuation omits all of these punctuation marks except when a period is required after an abbreviation at the end of a line. In the mixed style punctuation marks are used only after the salutation and the complimentary close. The illustration on page 592 of a business letter in full block form uses the open style; the letter in indented form on that page uses the close style. The letter in inverted paragraph form on page 593 uses the mixed style.

THE HIGHLAND LIFE INSURANCE COMPANY
2352 SOUTH JEFFERSON
DAYTON 3, OHIO

November 15, 195-

Mr. Lawrence C. Owens
2352 Elberon Avenue
Dayton 10, Ohio

Dear Mr. Owens:

Do you know exactly what will be your old-age insurance benefits, beginning at age 65, based upon your present income? Few people do. Have you made any provision for keeping a permanent record of the social security taxes deducted from your salary checks? If not, you should take care of this important matter at once.

As a service to our policyholders and friends we have prepared a substantially bound little book especially designed for keeping your social security records. This book also contains in simple language a summary of the provisions of the Social Security Act.

We shall be glad to send you a complimentary copy of the Social Security Personal Record Book, which you will want to keep with your valuable papers. You need only to sign and return the enclosed card.

Sincerely yours,

THE HIGHLAND LIFE INSURANCE COMPANY

D. W. Walker

D. W. Walker, Secretary

JH

Enclosure

INVERTED PARAGRAPH FORM—MIXED PUNCTUATION

NATIONAL OFFICE MANAGEMENT ASSOCIATION
1118 LINCOLN-LIBERTY BUILDING
PHILADELPHIA 7

March 19, 195-

Miss Office Secretary
Better Business Letters, Inc.
One Main Street
Busytown, U. S. A.

THE SIMPLIFIED LETTER

Here is something that must be given a fair trial if your judgment of it is to be fair--the Simplified Letter.

You're a competent secretary because you think well and because you have been well trained. Training means, among many things, that you've learned a traditional (and good) pattern of writing letters. But, now and then, it is wise to consider a break from tradition when a new (and better) concept comes along.

May we invite you to experiment with the Simplified Letter?

Notice these points among the many:

1 Date location
2 The address
3 The subject
4 The name of the writer
5 The format

When you discuss the Simplified Letter with your boss, think of the other points that will help to improve his letters.

We're sure you'll have good luck with better (Simplified) letters.

Vaughn Fry

VAUGHN FRY - RESEARCH & STANDARDS

R. E. Shull - W. H. Evans

SIMPLIFIED FORM—RECOMMENDED
BY NATIONAL OFFICE MANAGEMENT ASSOCIATION

Horizontal Placement: Modified Block Form	Horizontal Placement: Indented Form	Points To Be Observed
Centered, aligned with first letter of the city name in letterhead, or placed so that it ends at approximately the right margin	Centered or ending even with right margin	Do not abbreviate names of months. Avoid ordinal indications, such as May 10th, 195–. Unusual two- and three-line arrangements of the date are acceptable but time wasting.
All lines even with left margin	First line even with left margin; second line indented five spaces; each additional line indented an additional five spaces	Write individual and firm names as they appear on addressee's letterhead. Place official title at end of first line or beginning of second line, whichever gives a better balanced effect. Do not abbreviate *Street* or *Avenue* unless it will improve appearance. Do not use *City* for name of town or city. Use postal zone number whenever it is available.
Even with left margin, at paragraph point, or centered on a separate line; or centered on salutation line	Even with left margin, at paragraph point, or centered on a separate line; or centered on salutation line	Do not abbreviate *Attention*. Unnecessary to use "of," as in *Attention of Mr. A. C. Smith*. Unnecessary to use colon after *Attention*.
Even with left margin	Even with left margin	Do not capitalize the first letter of *dear* unless it is the first word of the salutation.
Even with left margin, at paragraph point, or centered	At paragraph point or centered	Do not abbreviate *Subject*. Capitalize important words in the subject. Use *Subject* rather than *In re* or *Re*.

Horizontal Placement		Points to be Observed
Modified Block Form	Indented Form	
First line of each paragraph even with left margin, or indented five or ten spaces	First line of each paragraph indented five or ten spaces	Paragraphs are usually shorter than in other forms of writing. Keep right margin line as straight as possible.
Even with left margin	Even with left margin	Use same margins as on preceding page. A second page should not begin with the last part of a divided word. The top of the new page should include at least two lines of a paragraph.
Slightly to left of center of page	Slightly to left of center of page	Longest of the closing lines should not extend noticeably beyond right margin. Capitalize first word only. Avoid contractions. Avoid *Yours truly* and *Truly yours* for they are now considered abrupt.
Even with beginning of complimentary close	Indented five spaces from beginning of complimentary close	Capitalize all letters. Type exactly as name appears on letterhead.
Even with beginning of company signature	Even with, or indented five spaces from, beginning of company signature	Capitalize first letters of important words in official title. Use title only in this position when the dictator's name appears in printed heading or is used in full in the reference line.

Horizontal Placement		Points to be Observed
Modified Block Form	Indented Form	
Even with left margin	Even with left margin	Dictator's name or initials may be omitted from the reference line if his name is typed under the signature. Periods, as well as spaces, are omitted after dictator's initials. Transcriber is identified by numbers in some offices.
Even with left margin	Even with left margin	Abbreviation *Enc.* is not recommended.
Even with left margin	Even with left margin	Abbreviation of *Separate Cover* is not recommended.
Even with left margin	Indent to paragraph point	The typewritten initials of the dictator may be used at the end of the postscript in place of a second signature.
Even with left margin	Even with left margin	Some offices include mailing notations only on the carbon copies at the top of the page. It is recommended, however, that the notation be placed on the original letter also.
Even with left margin	Even with left margin	Initials are sometimes substituted for the full names. When the names or the initials of two or more persons are listed, a different name should be checked on each copy. If the carbon-copy information is not for the benefit of the addressee, place this information on the carbon copies only. In that case, it may be placed at the top rather than at the bottom of the letter.

SECTION B. SPECIAL ADDRESS FORMS AND SALUTATIONS

This reference section gives the correct forms of address and the appropriate salutations for the following seven special groups:

1. Federal Government officials
2. Ambassadors, ministers, and charges d'affaires
3. State and local government officials
4. Churchmen
5. Educators
6. Army officers
7. Navy officers

In each model the correct address form is shown at the left and the appropriate salutations in order of decreasing formality are shown at the right.

1. FEDERAL GOVERNMENT OFFICIALS

The President

The President The White House Washington, D. C.	Sir Mr. President Dear Mr. President My dear President Truman
The President of the United States Washington, D. C.	

The Vice-President

The Vice-President United States Senate Washington, D. C.	Sir My dear Sir Dear Sir Mr. Vice-President
The Honorable Alben W. Barkley Vice-President of the United States Washington, D. C.	My dear Mr. Vice-President Dear Mr. Vice-President

Speaker of the House

The Speaker of the House of Representatives Washington, D. C.	Sir My dear Sir Dear Sir
The Honorable Samuel Rayburn Speaker of the House of Representatives Washington, D. C.	Mr. Speaker My dear Mr. Speaker Dear Mr. Speaker My dear Mr. Rayburn Dear Mr. Rayburn

2. AMBASSADORS, MINISTERS, AND CHARGES D'AFFAIRES

American Ambassadors

His Excellency
The American Ambassador to Great Britain
The American Embassy
London, England

Sir
Your Excellency
Dear Mr. Ambassador

The Honorable Lewis W. Douglas
American Ambassador to Great Britain
The American Embassy
London, England

Foreign Ambassadors

(Follow this general form.)

His Excellency
The Ambassador of Great Britain
British Embassy
Washington, D. C.

Sir
Excellency
Your Excellency
Dear Mr. Ambassador

His Excellency
Sir Oliver Shewell Franks
Ambassador of Great Britain
British Embassy
Washington, D. C.

American Ministers to Foreign Countries

The American Consul at
  (place name of country here)
(Place name of city and country here)

Sir
My dear Sir
Dear Sir
My dear Mr. Wells

Coleman Wells, Esq.
American Consul at
  (place name of country here)
(Place name of city and country here)

Mr. Coleman Wells
United States Consul at
  (place name of country here)
(Place name of city and country here)

Ministers from Foreign Countries

The Minister of
  (place name of country here)
The (name of country) Legation
Washington, D. C.

Sir
My dear Mr. Minister
  (or with personal title)

Mayor

The Honorable Martin Kennelly Mayor of the City of Chicago City Hall Chicago, Illinois The Mayor of the City of Chicago City Hall Chicago, Illinois	Sir My dear Sir Dear Sir My dear Mr. Mayor Dear Mr. Mayor My dear Mayor Kennelly Dear Mayor Kennelly

4. CHURCHMEN

PROTESTANT

Bishop (Protestant Episcopal)

To the Right Reverend A. B. Clark Bishop of New York (Specific postal address here)	Right Reverend and Dear Sir My dear Bishop Clark Dear Bishop Clark (informal)

Bishop (Methodist Episcopal)

The Reverend Bishop B. H. Ralston Bishop of the Northern Area Methodist Episcopal Church St. Paul, Minnesota	Dear Sir My dear Bishop Ralston Dear Bishop Ralston

Bishop (Anglican)

The Right Reverend the Lord Bishop of (name of bishopric here) (Specific postal address here)	My Lord Bishop My Lord

Dean (Ecclesiastic)

The Very Reverend the Dean of (place here name of church unit under his charge) (Specific postal address here)	Very Reverend Sir Sir Dear Dean Lowes (informal)

Protestant Clergymen

The Reverend W. B. Waltham 2001 Park Avenue Cleveland, Ohio	Reverend Sir (formal) My dear Sir Dear Sir My dear Mr. Waltham Dear Mr. Waltham

JEWISH

Rabbi

Rabbi James H. Heller Isaac M. Wise Temple Eighth and Plum Streets Cincinnati, Ohio	Reverend Sir My dear Sir Dear Sir My dear Rabbi Heller Dear Rabbi Heller

5. EDUCATORS

President (University or College)

President Herman Gerlach James Ohio University Athens, Ohio Dr. Herman Gerlach James President of Ohio University Athens, Ohio	My dear Sir Dear Sir My dear President James Dear President James

Dean of a College

Dean Thomas Cooke McCracken College of Education Ohio University Athens, Ohio Dr. Thomas Cooke McCracken Dean of the College of Education Ohio University Athens, Ohio	My dear Sir Dear Sir My dear Dean McCracken Dear Dean McCracken

Doctor of Philosophy (or Laws, or Medicine)

Dr. Richard L. French 4210 Crystal Lane Madison, Wisconsin	My dear Sir Dear Sir My dear Dr. French Dear Dr. French

Professor (College or University)

Dr. Thomas J. Beadle Vanderbilt University Nashville, Tennessee Thomas J. Beadle, Ph.D. Vanderbilt University Nashville, Tennessee	My dear Sir Dear Sir My dear Dr. Beadle Dear Dr. Beadle

6. ARMY OFFICERS

General

General Joseph L. Collins Chief of Staff United States Army Washington, D. C.	Sir My dear Sir Dear Sir My dear General Collins Dear General Collins

Army officers with ranks of lieutenant general, major general, or brigadier general should be addressed by their specific ranks, but salutations should use the term "General."

SECTION C. CAPITALIZATION

1. Capitalize proper nouns and adjectives, but do not capitalize words derived from proper nouns that have a specialized meaning.

> English, Henry, Chinese, china (meaning chinaware), roman type (but Roman numerals)

2. Capitalize the first word of a sentence and the first word of a direct quotation or thought, whether preceded by a comma or a colon.

> He remarked, "The sales campaign was very successful."
>
> He left the office with a verbal door slam: "You will find out how wrong you are! You will see that I am right as usual."
>
> I thought to myself as I left the conference: He has a lot to learn. (without quotation marks)

3. Begin both the salutation and the complimentary close of a letter with capitals.

My dear Mr. Jones	Very truly yours

4. Capitalize the days of the week, national holidays, the months of the year, feast and fast days of the church, and days and weeks of special significance.

Monday	Christmas
Fourth of July	Ash Wednesday
the Fourth	V-J Day
March	Sweetest Day
Ascension Day	National Safety Week

5. Capitalize nouns and abbreviations (except *page, line,* and *verse*) used with Roman or Arabic numerals.

Vol. I	Article II, Section 3	12:00 M. (noon)
Part III	Grades VII-IX	11:30 a.m.*
Table 10	Act 3, Scene 2	53 B.C.
Room 22	Scene 2	A.D. 1950
Article II	Fr. 30 (thirty francs)	page 123, line 8

*Most authorities permit a choice of either capitals or small letters for a.m. and p.m.

6. Capitalize the name of a division of knowledge when the name is used as the title of a specific course. Do not capitalize such a name when it is used to designate a common division of knowledge or a general study.

Arithmetic II	spelling
Typewriting IV	bookkeeping

7. Capitalize the first word of each section of an enumeration when the enumeration is preceded by a colon and (1) when each section is begun on a new line, and (2) when each section is a lengthy sentence or sentences.

> We have tried to improve production by the following methods:
> (1) Checking step-by-step operations
> (2) Changing operators
> (3) Getting advice from a local engineer

> We have tried to improve production in several ways: (1) We had our maintenance engineer, who set up the machine with the help of your man, check the step-by-step operation of it. (2) We had three different men operate it to determine if the poor production could be laid to the operator's lack of "know-how." (3) We called in a consulting engineer for advice at the cost of $50 per day.

> We have tried to improve production by the following methods: checking step-by-step operations, switching operators, and getting advice from a local engineer.

> He made several slanderous statements. For example: Our service department is manned by inexperienced "boys." Our method of getting contracts borders on the shady side. Our financial situation is so precarious that we resort to advance billing.

8. Capitalize the first word following a colon when the colon introduces a passage that is complete or a sentence that has an independent meaning. Do not capitalize the first word following a colon when the colon introduces a passage that is explanatory or dependent upon the introductory clause.

> The newspaper gave the following account: When the watchman passed. . . .

> His decision was based on two factors: the old machine is worn out, and the new machine will increase production.

9. Capitalize words and their derivations designating religions and their hallowed beings. Capitalize a pronoun referring to the Deity.

Christian	Messiah
the Almighty	Presbyterian
Supreme Being	Christian Science
Virgin Mary	Mohammedanism
Blessed Virgin	Buddha
Trinity	Allah

> We all know that Jesus believed the best of His enemies.

> We all know that He believed the best of His enemies.

10. Capitalize personifications and epithets.

The Chair called for a vote.
Old Man Winter has been used too often as an excuse for sales resistance.
Alexander the Great

11. Capitalize the names of individuals, buildings, and business houses in the ways they are customarily written.

Anne Obrien	mathilde frocks
Joseph D'Amato	Haskins & Sells
Olga von Till	Macmillan Company
Short Hills Post Office	South-Western Publishing Co.
Carew Tower	

Mr. de Rossett won easily.
De Rossett won easily. (A capital must be used at the beginning of a sentence.)

12. Capitalize (a) a title of rank, degree, or office that is joined to the name of a person and (b) the title of a high-ranking official when that title is used instead of the official's name.

The speaker is Professor Jackson.
Howard Lees, Doctor of Philosophy, is expected tomorrow.
I felt Senator Taft's position was debatable, but the Senator from Illinois disagreed.
The President will return to Washington today.

13. Capitalize official titles of groups and organizations, as well as the names given to their members.

the Masons
the CIO
Local No. 42, *but* The local unions did not participate.
the United Nations
a Communist, *but* communism and communistic
anti-Nazi, *but* naziism
Jewry, Jew, Jewess; the adjective *Jewish* is capitalized
United States Army, *but* an army interviewer

14. Capitalize titles of government departments, bureaus, and offices. (Authorities do not agree on the capitalization of such words as "government" and "federal" when they are not a part of the official title of the department, bureau, or office.)

Department of Agriculture
Bureau of Internal Revenue
Federal Bureau of Investigation
Census Office
government employees
The offices of the bureau are across the street.

15. Capitalize the parts of hyphened words according to the rules that apply to those words when they are used independently.

mid-August sales	anti-religious activity
Twenty-third Street	ex-President Hoover, *or*
Spanish-American War	former President Hoover

16. In resolutions, contracts, etc., write in all capitals the word "whereas," and use all capitals for or underscore the word "resolved." (a) After the word "whereas" do not use a comma unless punctuation is necessary in the sentence construction, and do not capitalize the first word unless it is a proper name. (b) After the word "resolved" use a comma and a capital letter.

WHEREAS the committee has recommended . . .
RESOLVED, That it be further . . .

17. In mentioning titles of published works, capitalize only the important words. Do not capitalize short, unimportant words, such as articles, conjunctions, and most prepositions. (Longer prepositions, such as "among," "before," and "between" are often capitalized, however.) Do not capitalize the article "the," even though a part of the title, in the body of a sentence.

A Manual of Style
Strictly Between Us
The article was in the *New York Times.*

18. Capitalize geographic names such as:

(a) Countries, and sections of countries when used as nouns but not when used as adjectives

United Kingdom	the Far East
British Commonwealth	North Atlantic States
Continental Europe	Middle West
the Continent	northern Ohio
the North Pole	middle-western region
the Promised Land	the Southland
East Africa	southern hospitality

(b) States and names of divisions of states

Michigan	Eleventh Congressional District
New York State	First Ward
the Garden State	Tenth Precinct
Hanover Township	Michigan
	Western North Carolina (which considers itself a division of North Carolina)

(c) Counties and boroughs

Westchester County
Queens Borough

(d) Cities and sections of cities

Mexico City	the Mall
Newark	the North Side
New York City	Fountain Square

(e) Mountains, rivers, lakes, islands, straits, streams, and coasts

the Andes	Madagascar
the Miami River	the Straight of Magellan
Styx River	the Gulf Stream
Lake Huron	the Gold Cost

(f) Thoroughfares, roads, and routes

the Express Highway	Pennsylvania Turnpike
U. S. Route 4	Lincoln Tunnel
State Route 17	Euclid Avenue

Exceptions: Do not capitalize a geographic term such as "city," "state," "river," "lake," or "valley" that is not a part of the name itself but that is used before the name. Also, do not capitalize a geographic term when it is used in the plural form.

the city of Cleveland	the Tennessee and Ohio rivers
the state of Arizona	the Indian and Atlantic oceans
the river Mississippi	the Ohio and Mississippi valleys
the valley of the Ohio	the states of Utah and Idaho

SECTION D. COMPOUND WORDS

For the proper way of writing a compound word check first in your dictionary. If the compound is not listed, it is written as two words unless it comes under one of the following rules:

1. A hyphen is used in compound numbers written as words.

sixty-two	thirty-third

2. A hyphen is used between the numerator and the denominator of a fraction written in words, except when one or both of these elements contain a hyphen or when the fraction is used as a noun.

a one-third interest	twenty-one hundredths
one third of the money	twenty one-hundredths

3. A hyphen is inserted in a word to avoid confusion with a word of the same spelling but different meaning.

re-cover (cover again)	re-lay (to lay again)

4. A hyphen is used in a compound that includes a single letter or a figure.

x-ray or X-ray	5-foot plank

5. A hyphen is used in a compound that begins with a noun in the possessive case.

bird's-eye	cat's-paw

6. When two or more hyphened compounds having a common basic element are used in a series and the basic element is omitted in all but the last compound, the hyphens are retained in all cases.

two-, three-, or four-ply construction
long- and short-term loans
four- and five-year-olds

7. The hyphen is used with the prefixes *ex* and *self* and the suffix *elect*. It is also used to join a prefix to a proper name.

ex-treasurer, self-defense, secretary-elect, pro-French

The hyphen is not used with short prefixes except when necessary to prevent mispronunciation or misinterpretation.

proslavery, transpacific, co-op (for co-operative)

8. Prepositional compounds are usually hyphened. (Consult your dictionary for verification.)

man-of-war, four-in-hand, father-in-law
editor in chief, commander in chief

9. Two or more words serving as a single adjective *before* a noun should be joined by a hyphen (see below for exceptions).

a ten-room house, *but* a house with ten rooms
a ten-year-old child
a teen-age driver
up-to-date charts, *but* the charts are up to date
reddish-brown paint
a come-as-you-are party

Exceptions. Rule 9 does not apply:

(a) To units enclosed in quotation marks.

a "come as you are" party
a "brain trust" idea

(b) To proper nouns.

a North Dakota wheat crop
of Scotch Irish descent

(c) To foreign phrases.

an *ad infinitum* discourse

(d) To an adverb and adjective before a noun.

a highly technical paper

(e) To chemical terms.

a ferrous type metal
a sodium nitrate explosive

(f) To possessives.

the substitute secretary's error

10. A hyphen is used in a compound consisting of an adjective or a noun joined with a participle.

rose-colored	dog-eared
plain-spoken	foreign-made
evil-minded	interest-bearing

SECTION E. NUMBERS

1. *Size of Number.* Most authorities recommend spelling out general numbers under 100, but all agree that general numbers under eleven must be spelled out.

There were seven items on the agenda.
We received 116 replies.

2. *Consistency.* If a sentence contains a number written in figures, then all other numbers in the sentence should be written in figures including those under eleven.

We received 1,875 replies from 31 cities in 7 states.

Exception: In all business writing except technical and statistical matter, a number at the beginning of a sentence is written in words even though other numbers in the same sentence are expressed in figures. Sometimes it is better to

7. *Fractions and Decimals.* Simple fractions that stand alone are usually written in words. Whole numbers and fractions are written as figures. Use the diagonal, not the hyphen, when typing fractions.

We need one-half dozen typewriter ribbons.
The average score was 87½.

Whole numbers and decimals are written as figures. A decimal fraction is written with one cipher to the left of the decimal point.

The average score was 87.5.
The difference, 0.05, was negligible.

8. *Numbers Usually Expressed in Words.* The following numbers are usually written in words.

(a) Decades and centuries.

the twenties, the eighteenth century, in the twenties

(b) Sessions of Congress, military bodies, and political divisions.

Eighty-second Congress, Sixteenth Infantry, Fifteenth Ward, Fourth Congressional District

(c) Age. Authorities differ on how to express age. Some recommend writing out the number in words; others, expressing it in figures. However, if an approximate age is given, write it out in words.

He looked to be about forty years old
children between three and five
a thirty-five-year-old residence

9. *Numbers Usually Expressed in Figures.* The following numbers are usually written in figures.

(a) Measurements.

62 miles, 7 feet 3 inches, 3 pints, 10 bushels, 80 acres, 25 cubic centimeters, 10 degrees, 15°, 8 tons, 5-ton shipment

(b) Percentages.

16 per cent

(c) Dates. The day of the month, when written after the name of the month, is expressed in figures without the ordinal indication. When the day precedes the name of the month, it is written with the ordinal indication.

August 25, *not* August 25th
the 25th of August

SECTION F. PUNCTUATION

Punctuation is used to help make clear the meaning of written or printed words. It serves the same purpose as the vocal pause, the change in voice, and the gestures that add meaning to thoughts expressed orally.

Good writing requires a minimum of punctuation. The test of the need for a particular punctuation mark is whether that mark facilitates exact understanding of the thought intended by the writer. If a punctuation mark does not pass that test, it should be omitted or another one should be used in its place.

It is not enough to know the specific rules of punctuation. An understanding of the basic principles involved is necessary as an accurate guide when choices of punctuation marks must be made. The functions of punctuation marks are, briefly:

1. A full break or complete stop is indicated by a period.
2. Minor breaks in the text are indicated by commas. They indicate proper relationships of words or groups of words that they separate.
3. The interpolation of matter in the main text is accomplished by using dashes, parentheses, brackets, or commas.
4. An omission is indicated by marks of ellipsis.
5. An introduction to matter that follows is indicated by the colon or the dash.
6. A break in the text that cannot be indicated adequately by a comma is marked by a semicolon.
7. The other punctuation marks—apostrophes, exclamation points, hyphens, question marks, and quotation marks—serve special purposes and are seldom confused.

Apostrophe

The apostrophe is used—

1. To form the possessive case.
   (a) The apostrophe should be placed after the complete name of the possessor, as in *student's record* and *students' records*.
   (b) If a one-syllable proper noun ends with a sibilant, the possessive is formed by adding *apostrophe s*, as in *Jones's*. If the proper noun has more than one syllable, the possessive is formed by adding only the

apostrophe, as in *Thomas'*, except when the name ends in *ce*, in which case an *apostrophe s* is added, as in *Lawrence's*. If the final sibilant is silent, the number of syllables is not a factor. The possessive is then formed by adding *apostrophe s*, as in *Des Moines's*.

(c) The possessive form of compound words is usually indicated by a change in the last word, as in *the father-in-law's defense*.

2. To form plurals of letters, figures, abbreviations, symbols, and certain words. These plurals are usually formed by adding *apostrophe s;* for example, *p's* and *q's*, *100's Ph. D.'s*, and *6's*.

3. To indicate contractions or omissions, as in the *Class of '45*, *let's* for *let us*, and *cont'd* for *continued*.

Brackets

Brackets can be made on the typewriter with the diagonal key and the underscore.

Brackets are used to enclose a parenthetical expression within material that is already enclosed in parentheses. They also are used as a type of editorial parentheses to indicate corrections, supplied omissions, or interpolations.

> You will find this particular statement in his biography (see *The Painter Paints* [Edition 1 only], page 67).
>
> He [the manager] submits his reports monthly.
>
> The check was for $25 [$24].

Colon

The colon is used—

1. To introduce formally a word, a list, a statement, or a question; a series of statements or questions; or a long quotation.

4. After the salutation of a business letter.

5. Between the place of publication and the name of the publisher in a bibliographic reference.

New York: Harcourt, Brace and Company, 195–.

6. In citations.

Luke 2:4

7. In expressing mathematical proportions.

2:9: :6:x (read orally as: 2 is to 9 as 6 is to x)

8. The colon is placed outside of quotation marks.

He read from his "labor of love": "The tension mounts steadily and we must be formulating our plans, plans of action! Now! Now! Now!"

Comma

The comma is used—

1. To set off an introductory subordinate clause or phrase containing a verb form.

When this page is done, the report will be ready.
Anticipating this, he withdrew his offer.

2. To set off a nonrestrictive phrase or subordinate clause. (A phrase or a clause is nonrestrictive if the main clause in the sentence expresses a complete thought when the nonrestrictive phrase or clause is omitted.)

His secretary, who is back from her vacation, will be able to help you.

3. To introduce a short, informal, direct quotation.

He said, "Well done!"

4. To separate long co-ordinate clauses that are joined by one of the following conjunctions: *and, but, for, neither, nor,* and *or*. The comma precedes the conjunction.

He worked rapidly and accurately, but he was unable to complete the payroll by five o'clock.

5. To set off phrases or expressions at the beginning of a sentence when they are loosely connected with the rest of the sentence.

As a rule, a secretary proofreads everything she types.

16. To separate the day of the month from the year.

He wrote on April 18, 195–.

17. To separate unrelated numbers.

In 1944, 975 new parts were manufactured.

18. To divide a number of four or more digits into groups of three, counting from right to left. A comma is not used for this purpose in numbers designating a page, a room, a telephone, a house, or a year.

2,916 books
2118 Carew Tower
PArkway 6255
1982 Tryon Road
page 1283

19. To set off phrases that denote residence or position.

Dr. M. J. Frank, of the General Hospital, was the first speaker.

20. To indicate the omission of a word or words readily understood from the context.

In June the book sales amounted to $523; in July, $781.

21. To separate the declaratory from the interrogative part of a sentence.

This report is very encouraging, is it not?

22. To separate the surname from a designation, such as *Jr.*, *Sr.*, or *Esq.*

Henry Walsh, Jr. John Saunders, Esq.

23. A comma is *not* used to separate the component parts of weights, dimensions, or measures.

3 lb. 8 oz. 2 ft. 6 in. 7 hr. 36 min.

Dash

In typewritten work the dash is represented in either of two ways:

1. By two unspaced hyphens without spaces preceding or following the mark.

2. By a single hyphen with a space on each side.

No other punctuation mark is used with the dash except the exclamation point or the question mark.

3. To enclose material that is quite independent of the main thought of the sentence.

> We are not interested (at any rate, not at the present time) in your proposition.

4. To enclose explanatory material.

> A tabulation of these figures (see Table 2) is most revealing.

When other marks of punctuation are used with parentheses, the following rules apply:

1. Neither a comma nor a dash is retained before a parenthetic expression. If the punctuation mark is necessary, it is used after the closing parenthesis.

> He sent a belated, though clever (and somewhat personal), greeting.

2. A punctuation mark at the end of a parenthetic expression precedes the parenthesis if it applies to the parenthetic material only. It follows the parenthesis if it applies to the sentence as a whole.

> When I heard him speak (he asked, "Who goes there?"), I was very much surprised.
>
> This experiment had interesting results (see Table I).

Period

The period is used—

1. After a declarative or an imperative sentence.

> The contract has been signed.

The period is not used if the sentence is enclosed parenthetically within another sentence.

> The contract (I received it just last night) has been signed.

2. After initials in a name and after most abbreviations (see the exceptions given on page 626).

> J. A. Harrison oz.

3. As a decimal point and as a mark of separation between dollars and cents expressed in figures.

> 16.002 $52.41 (*but* $500)

4. After an indirect question or polite request.

> She asked whether the report had arrived.
> Will you please deliver this at once.

5. After a side heading unless it is written on a separate line.

Periods are not used after:

> Contractions, as in "sec'y"
> Chemical symbols, as Na
> Roman numerals, as in Louis XIV
> The words "per cent"
> The abbreviations MS, Mme, Mlle, and Ste

Question Mark

The question mark or interrogation point is used—

1. After a direct question.

> When is this report due?

2. To express doubt. For this purpose the mark is enclosed in parentheses.

> He said the report was half (?) done.

Quotation Marks

Quotation marks (double) are used—

1. To enclose direct quotations. A quotation within a quotation is indicated by single quotation marks.

> He wrote, "The instructions definitely say, 'The officers must be elected at this first meeting.'"

When consecutive paragraphs are part of the same quotation, quotation marks are used at the beginning of each paragraph but only at the end of the last paragraph.

The University of Chicago's *Manual of Style* says to,

> "Quote an unusual, technical, or ironical word or phrase in the text, whether or not accompanied by a word (like 'so-called') directing attention to it.
>
> "Quote a word or phrase accompanied by its definition, as 'Drop folio' means a page number at the foot of the page.
>
> "Quote the particular or unusual word or words to which attention is directed, in order to make the meaning clear."

2. To enclose the titles of subdivisions (parts, chapters, etc.) of publications, as well as titles of articles, plays, lectures, reports, etc. Titles of publications are underlined on the typewriter and italicized in printed matter.

The article "War Profits" appeared in *Business Week*.

3. To enclose unusual or peculiar terms, words used in some special sense, or words to which attention is directed in order to make the meaning clear.

This is "pork barrel" legislation.

He said "yes," not "guess."

I used the term "acknowledgment."

At the end of quoted matter a quotation mark is often used with another mark of punctuation. The following rules apply:

1. A period or a comma should always precede, not follow, the quotation mark even though it may not be a part of the quotation.

"I saw you," he said, "when you left."

2. A semicolon or a colon should always follow, not precede, the quotation mark even though it may be a part of the quotation.

They visited that "house of antiques"; and the "antiques" were really unusual.

There is this to say about his "mission": it is fictitious.

3. Other marks of punctuation should precede the quotation mark if they apply to the quotation only, and they should follow the quotation mark if they apply to the sentence containing the quotation and not to the quotation.

She asked, "Will you go?"

Did you read the article "Better Sales Letters"?

"Happy landing!" they shouted.

He said, "We are very proud of our organization . . . ."

Semicolon

The semicolon is used—

1. Between clauses of a compound sentence that are not joined by a conjunction.

The report was due Monday; it arrived Friday.

2. Before certain connectives when they introduce sentences, principal clauses, or an abrupt change in thought. These connectives are: *also, consequently, for, hence, thus, however, if, in fact, indeed, in short, nevertheless, that is, therefore, then, whereas, yet.*

> The need for help is urgent; hence the agitation for immediate legislation.

3. To separate groups of words in a series when such groups are internally punctuated with commas.

> The chapter includes the following: alphabetizing, indexing, and coding; vertical files, visible index files, and loose-leaf books; follow-up methods, etc.

4. Before such words and abbreviations as *namely, for example, viz., to wit, i.e.,* and *e.g.* when they introduce an enumeration.

> There are two reasons for my decision; namely, the territory is smaller, and it is a concentrated market.

Spacing After Punctuation Marks

1. Within a sentence space twice after a colon but only once after other punctuation marks. However, do not space after a period within an abbreviation, such as in *a.m.*

2. Space twice after a punctuation mark at the end of a sentence.

SECTION G. DIVISION OF WORDS

In order that the right margin of a letter or business report may be kept approximately even, it is frequently necessary to divide a word at the end of a line. The dictionary is the final authority about the correct division of words; but, in general, the rule is to divide or syllabicate according to pronunciation so that the meaning of the word will not be obscured. The following specific rules apply to the syllabication in typewritten copy.

1. When it is necessary to divide a word, the hyphen (used to indicate the syllable division) is always placed at the end of the syllable on the first line. Hyphens at the end of more than

two successive lines are in poor form. Do not divide a word at the end of a page.

2. Never divide a word of one syllable. Do not divide words of four letters, regardless of whether they contain two or more syllables. If possible, avoid dividing words of five or six letters.

3. A one-letter syllable at the beginning or the end of a word must not be separated from the remainder of the word; as, *alone*, not *a-lone*, and *ready*, not *read-y*. Avoid separating a two-letter syllable from the rest of the word either at the beginning or the end of the word.

4. When a word containing three or more syllables is to be divided at a one-letter syllable, the one-letter syllable should be written on the first line rather than on the second line; as *maga-zine*, not *mag-azine*. When a word is to be divided at a point where two vowels that are pronounced separately come together, however, these vowels should be divided into separate syllables; as, *continu-ation*.

5. A syllable that does not contain a vowel must not be separated from the remainder of the word; as, *wouldn't*.

6. Hyphened compounds, such as *three-quarters*, *follow-up*, and *by-product*, should not be divided except at the hyphen.

7. A prefix or a suffix may usually be separated from the rest of the word; as, *sub-mission*, *will-ing*, *thought-ful*. For exceptions to this rule, see Rule 3.

8. When a final consonant is doubled before a suffix, the additional consonant should be placed with the suffix; as, *begin-ning*, *refer-ring*, *permit-ted*.

9. It is considered poor style to separate any of the following:

a. A qualifying sign, such as the dollar sign, from the figures to which it belongs
b. One part of an abbreviation from the other part
c. Numbers of the same grouping
d. Degrees or titles from a name
e. Marks of subdivisions from the materials that follow
f. Initials and names in the same grouping

Plurals of Abbreviations. Plurals of abbreviations are formed in one of the following ways:

(a) By adding *s* to the singular form, such as *lbs.* or *hrs.*

(b) Doubling the single letter abbreviation of the singular form, such as *pp.* for *pages.*

(c) By adding an *apostrophe s* to the singular form, such as IOU's. c.o.d.'s, OK's.

The plural form of some abbreviations, however, is the same as the singular form, such as *ft.*, *in.*, *oz.*

Coined Verbs. When an abbreviation is used as a verb, an apostrophe with *s*, *d*, or *ing* is added to the abbreviation, such as OK's, OK'd, OK'ing.

Possessives of Abbreviations. The singular possessive is formed by adding the apostrophe and *s*, for example, SOS's, Jr's. The plural possessive is formed by adding an apostrophe to abbreviations whose plural forms end in *s*, such as *Drs'.*

ABBREVIATIONS OF STATES AND TERRITORIES

Ala.	Alabama	N. J.	New Jersey
Ariz.	Arizona	N. Mex.	New Mexico
Ark.	Arkansas	N. Y.	New York
Calif.	California	N. C.	North Carolina
C. Z.	Canal Zone	N. Dak.	North Dakota
Colo.	Colorado	Neb.	Nebraska
Conn.	Connecticut	Nev.	Nevada
D. C.	District of Columbia	Okla	Oklahoma
Del.	Delaware	Ore.	Oregon
Fla.	Florida	P. I.	Philippine Islands
Ga.	Georgia	P. R.	Porto Rico
Ill.	Illinois	Pa. or Penna.	Pennsylvania
Ind.	Indiana	R. I.	Rhode Island
Kans.	Kansas	S. C.	South Carolina
Ky.	Kentucky	S. Dak.	South Dakota
La.	Louisiana	Tenn.	Tennessee
Md.	Maryland	Tex.	Texas
Mass.	Massachusetts	Vt.	Vermont
Mich.	Michigan	Va.	Virginia
Minn.	Minnesota	V. I.	Virgin Islands
Miss.	Mississippi	Wash.	Washington
Mo.	Missouri	W. Va.	West Virginia
Mont.	Montana	Wis.	Wisconsin
N. H.	New Hampshire	Wyo.	Wyoming

The following states and territories have no officially recognized abbreviations: Alaska, Guam, Hawaii, Idaho, Iowa, Maine, Ohio, Samoa, and Utah.

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